**Salesforce LLC Proposal: Salesforce and HubSpot Support Services**

**Title:** CRM-Driven Web Agility and Customer Engagement Support Services  
**Client:** Salesforce LLC  
**Contract Type:** Firm-Fixed Price / Time & Materials / Hybrid  
**Scope Period:** 72-Month Ordering Period  
**Total Estimated Value:** Subject to Order

**1. Introduction**

Salesforce LLC is seeking to establish a Blanket Purchase Agreement (BPA) with a qualified vendor to support enterprise-level web and CRM platform services, specifically centered around Salesforce and HubSpot. The objective is to modernize engagement, enable real-time decision-making, streamline marketing-to-sales workflows, and ensure full compliance with data governance standards. This proposal outlines a comprehensive framework for delivering CRM and digital experience support services aligned with Salesforce Sales Cloud, Service Cloud, Marketing Cloud, HubSpot Marketing Hub, CMS, and associated integrations.

The purpose of this engagement is to ensure that Salesforce LLC can continue to provide best-in-class services to its clients and stakeholders by leveraging the full capabilities of Salesforce and HubSpot platforms. These platforms are critical to managing customer relationships, automating marketing processes, and ensuring operational agility. This proposal ensures an aligned roadmap that covers ongoing support, implementation of new capabilities, and governance that safeguards integrity, security, and performance across the enterprise digital ecosystem.

**2. Background**

Salesforce LLC operates in a rapidly evolving digital landscape, where personalized customer engagement and timely decision-making are vital for success. The company currently uses Salesforce as its primary CRM and HubSpot for marketing automation and customer communication. However, there is a need to enhance the efficiency of both platforms, improve system integration, and enable scalability through strategic technical support and governance. This BPA will serve as the mechanism to engage one or more vendors capable of providing comprehensive Salesforce and HubSpot services.

The current digital stack relies heavily on the synergistic use of Salesforce CRM for lead and opportunity tracking, customer service, and reporting, while HubSpot supports lifecycle marketing, content management, and user engagement analytics. Without a unified approach to integration, maintenance, and governance, both platforms risk becoming siloed. This proposal addresses this challenge by outlining the service areas needed to manage, extend, and optimize these critical platforms in concert.

**3. Objectives**

* Establish a scalable and modular support framework for Salesforce and HubSpot.
* Improve lead-to-customer lifecycle visibility and cross-channel campaign execution.
* Ensure system integrity, accessibility, and compliance across all CRM-related workflows.
* Develop new functionality, integrations, and automation aligned with business goals.
* Provide continuous operations and training support across all business units.
* Enable a 360-degree customer view for strategic and tactical business decisions.
* Streamline marketing, sales, and service operations through automation and process redesign.
* Implement governance frameworks that ensure long-term sustainability and innovation.

**4. Task Areas**

**Task Area A: Project Meetings and Monthly Reporting**

* Attend bi-weekly and ad-hoc stakeholder meetings with CRM and marketing teams.
* Present implementation roadmaps, backlog prioritization, and development progress.
* Prepare monthly reporting packages including:
  + Active initiatives and sprint deliverables
  + Open support tickets and resolution times
  + HubSpot campaign KPIs and Salesforce opportunity metrics
  + Utilization and capacity planning for development and admin resources
* Provide time and cost projections by labor category and task order.
* Develop visual dashboards for leadership summarizing task order performance and ROI.

**Task Area B: Strategic Planning and CRM Governance**

* Develop and maintain a unified governance framework for Salesforce and HubSpot usage.
* Define lifecycle policies for lead generation, nurturing, sales engagement, and post-sales support.
* Facilitate quarterly CRM strategy reviews, security audits, and roadmap planning sessions.
* Document campaign management policies and role-based permissions.
* Evaluate and standardize platform usage across regions, business units, and functions.
* Conduct change impact assessments and create governance playbooks for new feature rollouts.

**Task Area C: Operations and Maintenance of CRM Systems**

* Manage Salesforce objects, fields, flows, triggers, dashboards, and custom metadata.
* Update HubSpot forms, workflows, CMS assets, and segmentation lists.
* Monitor system performance, data sync processes, and automated marketing triggers.
* Apply quarterly updates, system patches, and release changes.
* Maintain secure OAuth-based integrations and multi-factor authentication (MFA).
* Handle record deduplication, activity history, and audit log reviews.
* Ensure sandbox-to-production deployment integrity.

**Task Area D: Help Desk Support and Ticketing System Management**

* Provide Tier 1–3 help desk services for Salesforce and HubSpot-related issues.
* Implement SLA-driven ticket workflows with escalation policies in Jira and Service Cloud.
* Develop and maintain a knowledge base for self-service and internal FAQs.
* Deliver incident root cause analyses and post-resolution documentation.
* Support user provisioning and de-provisioning, access control, and permission audits.

**Task Area E: CRM and CMS Implementation, Redesign, and Migration**

* Implement custom Salesforce apps and objects to support specialized business workflows.
* Migrate legacy marketing lists, templates, and web forms into HubSpot.
* Redesign HubSpot CMS pages to align with accessibility standards and SEO best practices.
* Execute A/B testing and publish marketing assets with real-time analytics tracking.
* Deploy Salesforce Experience Cloud portals for internal and external collaboration.
* Document migration plans, validation scripts, and rollback strategies.

**Task Area F: Content Management and CRM Workflow Configuration**

* Configure Salesforce lead scoring models and engagement-based routing rules.
* Design HubSpot contact lifecycle stages and conversion paths.
* Manage lead database hygiene, email subscription preferences, and marketing consents.
* Synchronize field mappings, campaign assignments, and activity logging across tools.
* Establish naming conventions and content governance structures.

**Task Area G: Development and Accessibility**

* Develop Apex classes, Lightning Web Components (LWC), and Visualforce pages.
* Build HubSpot custom modules using HUBL, JavaScript, and HTML/CSS.
* Implement WCAG 2.1 AA standards for all customer-facing digital assets.
* Perform accessibility audits using SiteImprove and Lighthouse.
* Collaborate with legal/compliance teams for conformance reviews.

**Task Area H: Quality Assurance and Testing**

* Conduct unit, integration, and UAT for all Salesforce and HubSpot features.
* Automate regression testing using Selenium, Postman (API), and Apex test classes.
* Develop QA test plans and traceability matrices.
* Maintain sandbox refresh schedules and version control (Git, Bitbucket).
* Provide release sign-off and rollback testing.

**Task Area I: Project Management and Documentation**

* Create and maintain Project Management Plans, Risk Registers, and Gantt Charts.
* Generate technical specifications, user stories, and acceptance criteria.
* Provide earned value metrics, velocity charts, and burn-down reports.
* Use PM tools such as Jira, Confluence, Asana, and MS Project.
* Conduct project retrospectives and lessons learned documentation.

**Task Area J: Operational Excellence and DevOps Support**

* Build CI/CD pipelines for Salesforce metadata deployment using GitHub Actions or Copado.
* Maintain custom deployment flows for HubSpot via APIs.
* Monitor performance metrics using New Relic, DataDog, and native dashboards.
* Optimize Apex governor limits, SOQL query performance, and bulkification.
* Automate daily error reporting and build pipeline audit trails.

**Task Area K: Backup and Disaster Recovery**

* Configure daily metadata and data backups using OwnBackup or Salesforce Native Backup.
* Maintain backup snapshots for HubSpot forms, workflows, and marketing assets.
* Perform quarterly disaster recovery drills with rollback validation.
* Maintain documentation for Recovery Time Objective (RTO) and Recovery Point Objective (RPO).
* Ensure recovery procedures align with internal IT compliance policies.

**Task Area L: Training and Enablement**

* Deliver role-based training for sales, service, and marketing teams.
* Develop LMS-compatible training content and self-paced modules.
* Conduct live training sessions, town halls, and documentation walkthroughs.
* Track enablement metrics through quiz scores, NPS, and engagement tracking.
* Incorporate feedback mechanisms to refine training effectiveness.

**Task Area M: Advanced Media and Customer Interaction Tools**

* Integrate HubSpot and Salesforce with video platforms (Vidyard, ZoomInfo).
* Enable interactive content delivery with dynamic CTAs and personalization tokens.
* Use conversational AI and chatbots integrated into Salesforce Service Cloud.
* Analyze video engagement and integrate insights into lead scoring models.

**Task Area N: Integration Oversight and API Governance**

* Develop and monitor REST and GraphQL APIs across Salesforce and HubSpot.
* Establish integration patterns for ERP, BI tools (Tableau), and third-party SaaS apps.
* Maintain API gateway rules, payload encryption, and webhook retries.
* Perform throughput monitoring, latency tracking, and usage audits.

**Task Area O: Emerging Needs and Innovation Support**

* Conduct POCs for Einstein AI, HubSpot AI, and predictive lead scoring.
* Evaluate emerging automation tools (e.g., Zapier, Workato) for departmental use.
* Propose pilots for revenue intelligence, deal scoring, and lifecycle stage prediction.
* Support new feature onboarding and change management strategy.
* Maintain innovation backlog and quarterly review with stakeholders.

**5. Service Level Agreement (SLA) Commitments**

* **Response Time:** Tier 1 - within 4 business hours; Tier 2/3 - within 1 business day.
* **Uptime Guarantee:** 99.9% for non-scheduled platform functions.
* **Resolution Time:** High priority - 24 hours; Medium - 72 hours; Low - within 5 business days.
* **Monthly Reporting:** Including ticket resolution, service metrics, platform uptime, and user feedback.
* **Escalation Matrix:** Defined contact hierarchy for unresolved or high-impact issues.

**6. Compliance and Security**

* GDPR, CAN-SPAM, CCPA, and HIPAA-aligned platform configurations.
* Role-based access controls and audit trails in both Salesforce and HubSpot.
* MFA enforced for all admin users and data processors.
* Conduct semi-annual security audits and vulnerability scans.
* Implement DLP (Data Loss Prevention) and anomaly detection rules.
* Secure transmission with TLS 1.2+ for all data exchange.

**7. Conclusion**

Salesforce LLC requires an agile, CRM-centric partner capable of delivering seamless Salesforce and HubSpot support across the full digital engagement lifecycle. This proposal presents a detailed structure for managing strategic CRM enhancements, operational stability, and innovative capabilities tailored to Salesforce LLC's evolving needs. Each task area is engineered to optimize customer experience, streamline operations, and maintain compliance with the highest standards of digital excellence.

With a forward-thinking support model grounded in industry best practices, this proposal ensures Salesforce LLC is well-positioned to continue leading in customer relationship management, while remaining agile and responsive in a rapidly evolving digital ecosystem. From integration architecture to help desk services, from automated marketing to AI enablement, this comprehensive service framework delivers measurable outcomes and long-term value.