A group of people standing in front of a city

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**Volume I – Technical Proposal**

**Factor 1 – FedRAMP, Solution Overview & Capabilities Checklist**

A picture containing text, clock, dark, gauge

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**Stealth Solutions, Inc.**

**Response**

**to**

**Department of Justice/Civil Rights Division**

**CRT Case Management**

**Request for Quotation 15JPSS23Q00000081**

**August 18, 2023**

**Submitted By:**

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Table of Contents

[1 Technical Proposal 1-1](#_Toc143235048)

[1.1 Introduction 1-1](#_Toc143235049)

[1.2 Understanding of CRT Case Management System Requirements: 1-2](#_Toc143235050)

[1.3 Solution Overview 1-3](#_Toc143235051)

[1.4 FedRAMP High Compliance 1-5](#_Toc143235052)

[1.5 Implementation Approach: 1-5](#_Toc143235053)

[1.6 Attachment 1 – DOJ CRT Functional Requirements Checklist 1-10](#_Toc143235054)

[2 Staffing Plan 2-1](#_Toc143235055)

[Appendix A – User Research and User Experience (UX) Design 1](#_Toc143235056)

[Appendix B – Resumes and Letters of Intent 1](#_Toc143235057)

[2.1 Resume and Letter of Commitment – Vishnu Devarashetty, Program Manager 2](#_Toc143235058)

[2.2 Resume and Letter of Commitment – Akeem Shane, Technical Lead 4](#_Toc143235059)

# Technical Proposal

## Introduction

Stealth Solutions, Inc. (Stealth) is a Virginia-based 8a small business incorporated in 2014 with key team management involved with and certified at various levels of Salesforce for more than 12 years each. Additionally, Stealth is a consulting partner of Salesforce. As a Salesforce Consulting Partner, Stealth provides our clients the expertise to configure, customize, and develop customer-specific applications on the Salesforce Platform like Grants Management, Case Management, Contact Management, Learning Management, and others.

Stealth’s Salesforce team encompasses a mindset to deliver maximum value to clients while transitioning to Salesforce and provides continued operational support excellence to realize the Salesforce value indefinitely. Stealth’s Salesforce team was built by hiring the best talent in the market and mentoring the talent to deliver results the way Stealth has always delivered to our customers.

The four key areas of Stealth’s Salesforce team deliverables are as follows:

* Stealth’s Salesforce Consulting Services – One of the biggest IT challenges organizations to face today is: Should we move to the cloud? If so, two critical decisions must be made: 1) Which cloud to choose, and 2) Which business applications to move. Stealth Salesforce Consulting Services works with clients as their trusted IT Partners in identifying what applications are best suited to migration to Salesforce and lays out a migration and product roadmap for a Salesforce Transition. Stealth also works with clients on process enhancements, data migration strategies, and change management challenges as part of the transition.
* Stealth’s Salesforce Implementation Services – As part of the Implementation Services, Stealth provides our clients with the expertise to implement Salesforce to deliver maximum value. We provide a team of Salesforce consultants who are certified and experienced in configuration, customization, integration, and data migration.
* Stealth’s AppExchange Product Implementation – The enterprise marketplace available from Salesforce – AppExchange – provides more than 3,000 enterprise applications that can be used by many customers for various business needs and can eliminate a significant custom development effort. Even though AppExchange provides many great applications that can be quickly downloaded and installed, many applications need either configuration or customization to the core product. Stealth works with clients to provide 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.
* Stealth’s Client Operations Management Program (COMP) – COMP is a monitoring, maintenance, enhancement service offered to clients with Salesforce systems already established. COMP is provided with an assortment of support options based upon each client’s specific needs. Standard services involve essential O&M services, including user management, release preparation, problem-solving, testing, documentation, and critical updates. Additional services entail system enhancements, impediments, defects, and business function change requests. COMP clients have a Subject Matter Expert on staff to support their needs to remain operable through system issues, expansion, and user growth; these include support for the Salesforce releases three times a year, third-party application add-ons, API interfaces, records management, and more.

Stealth’s Salesforce team will utilize the capabilities across these four key areas to meet the needs of DOJ CRT Case Management Services.

Stealth understands the desire to contract for all services and licenses within a single contract. Stealth easily accommodates this requirement as a Carahsoft/Salesforce reseller of Salesforce-licensed licensed products and ReconELM. From a contractual perspective, Stealth is a small business on the MAS contract vehicle #47QTCA22D0053. The software licenses will be contracted as an ODC, and all services are placed as MAS labor category rates with details provided in Volume III Pricing. Stealth will also have a large business subcontractor, REI Systems, to complete our well-rounded Team Stealth for full-service deliverables and a great backdrop if any unexpected surge requirements are uncovered in the future.

## Understanding of CRT Case Management System Requirements:

At Team Stealth, we have conducted a meticulous analysis of the RFP requirements, delving into the scope provided to unveil the substantial challenges confronting the Civil Rights Division (CRD), as it embarks on the implementation of a novel Case Management System (CMS) and the pivotal migration of historical data. The CRD currently relies on an ICM Tech Stack and a Web Time Tech Stack, both underpinned by Oracle Databases. The focal predicament revolves around the necessity to replace the incumbent case management system with an advanced solution, one that will significantly elevate operational efficiency and bolster the spectrum of reporting capabilities.

Within this context, several critical challenges come to the forefront:

1. **System Obsolescence**: The existing case management infrastructure is marked by obsolescence and operational inefficiency. This jeopardizes the CRD's proficiency in effectively handling cases and generating comprehensive historical reports – an essential component of informed decision-making.
2. **Precise Data Migration**: The crux of the challenge resides in the seamless transfer of pivotal historical data from the aging system to the new CMS. Ensuring the absolute accuracy and integrity of this data during migration stands paramount, as it preserves the invaluable historical context that underpins each case.
3. **Integration and Transition Expertise**: The assimilation of novel Commercial Off-The-Shelf (COTS) software necessitates meticulous planning and execution to avert any potential disruptions during the transitional phase. Our focus centers on orchestrating a seamless transition that ensures uninterrupted service continuity.
4. **Data Validation and Governance Imperative**: Elevating data validation protocols and establishing a robust data governance framework emerges as a foundational imperative. This strategic approach is geared toward ensuring the unwavering quality and reliability of data within the new CMS, thereby pre-empting errors and inconsistencies that may have persisted within the previous system.

Our resolute commitment to understanding these multifaceted challenges reflects our profound comprehension of the CRD's business needs and the intricacies entailed in orchestrating a seamless transformation. By enlisting Team Stealth's expertise, the DOJ can be assured of a partner who not only comprehends these nuances but is unwaveringly dedicated to overcoming them while ensuring a superlative outcome.

## Solution Overview

Team Stealth proposes to deliver the case management system for CRT using Salesforce GovCloud+ Commercial Off-The-Shelf (COTS) platform for Service Cloud CMS integrated with **ReconELM** app. ReconELM is a comprehensive legal case and matter management (COTS) application built on the Salesforce platform. It is specifically designed to cater to the needs of attorneys and support staff within government agencies. ReconELM brings together the power and security of Salesforce to offer an efficient and user-friendly solution for managing legal cases. Its key features and benefits include:

* **Tailored to Legal Professionals**: ReconELM is crafted by industry veterans with extensive experience in legal case management. This ensures that the system is attuned to the unique requirements and workflows of legal professionals, enhancing their efficiency and productivity.
* **Full Lifecycle Support**: ReconELM covers the complete lifecycle of a legal matter, from initial intake to investigation and eventual resolution. This end-to-end support streamlines the process and ensures all relevant information is tracked and managed effectively.
* **Built with Robust Constructs**: The system is built around core constructs such as Matters, Intakes, Time Entry, and Reporting offering a structured approach to capture and process crucial data during case management. It facilitates easy documentation of legal matter details, including name, type, stage, status, description, and dates, ensuring comprehensive case tracking.
* **Intake Management**: ReconELM efficiently handles incoming requests for legal work. These intakes can be seamlessly transitioned into Investigations or Matters based on the organization's workflow.
* **Time Entry**: The integrated Time Entry feature ensures accurate recording of time spent on various case-related tasks. This aids in precise time tracking and reporting, which is essential for legal billing and resource allocation.
* **Robust Reporting**: ReconELM includes a flexible reporting module that allows users to generate detailed reports and perform in-depth analysis. The self-service filtering and summation capabilities empower users to extract valuable insights from the data.
* **Configurability**: ReconELM’ s design promotes configurability, enabling organizations to tailor the system to their specific needs without resorting to extensive customizations. This approach reduces implementation time and effort.

Considering the Department of Justice (DOJ) Civil Rights Division (CRT) Case Management System, the Salesforce GovCloud+ platform and ReconELM COTS application seem exceptionally suitable for multiple compelling reasons:

* **Salesforce Platform Advantage**:Harnessing Salesforce offers inherent security, scalability, and reliability, aligning with the rigorous data protection needs of government agencies like the DOJ. The platform's powerful architecture, global search, flexible data sharing, seamless integration, and efficient data management ensure optimal growth, controlled access, cohesive workflows, and streamlined data handling.
* **ReconELM COTS Application Advantages**: ReconELM, a versatile COTS solution, is preconfigured for Attorneys and Government Support Staff, incorporating essential data models, workflows, reports, and automation. Its adaptability suits DOJ's needs, minimizing complex customizations for seamless integration and user acceptance.
  + **Expertise-Driven**: Leveraging legal case management proficiency, ReconELM integrates best practices and industry standards, ensuring accurate, compliant case records.
  + **Efficient Case Handling**: Streamlined data creation, updates, and monitoring optimize operations and insights.
  + **Customizable Time Tracking**: Precision record-keeping through adaptable time tracking.
  + **Data-Driven Decisions**: Dynamic reporting and dashboards empower informed choices.
  + **Enhanced User Experience**: Intuitive drag-and-drop interface customization improves user engagement.

In conclusion, the combination of the Salesforce GovCloud+ platform and the ReconELM COTS application emerges as the potent solution, aligning with the unique demands of the DOJ CRT Case Management System and holding the promise of enhanced efficiency, accuracy, and user satisfaction.

A screenshot of a computer

Description automatically generatedThe Salesforce platform architecture (depicted left), bolstered by Salesforce Service Cloud, enables Team Stealth to configure the CRT case management system harmoniously, enhancing efficiency and collaboration. This robust solution empowers effective case management, process optimization, and operational excellence for CRD. ReconELM, part of our full COTS solution, efficiently handles Cases and related data, as depicted in the screenshot below.

A screenshot of a computer

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## FedRAMP High Compliance

The FedRAMP-authorized Salesforce Government Cloud – the premier enterprise cloud for government - offers stakeholders self-service tools, streamlining data, processes, and people connectivity while reducing risk, cost, and complexity. With an isolated infrastructure meeting Government Certification requirement, this trusted Government Cloud accelerates secure government transformation, deploying solutions rapidly and securely within a multi-tenant cloud infrastructure compliant with security and compliance demands.

Salesforce's triumph in government is rooted in its unwavering commitment to secure Cloud experiences. Salesforce's cloud-based Software as a Service (SaaS) and Platform as a Service (PaaS) solutions hold a FedRAMP High Impact certification, assuring the DOJ of data security. Additionally, Salesforce holds a Provisional Authorization (PA) from Defense Information Systems Agency (DISA) at Impact Level 4 (IL4) and compliance attestation with NIST SP 800-171 from a FedRAMP-approved third-party auditor.

This cloud-centric approach empowers DOJ to optimize administrative processes, offering agility, speed-to-value, and user-friendliness across stakeholders. In May 2020, the Salesforce Government Cloud Plus obtained provisional Authority to Operate (ATO) at the high impact level, endorsed by the FedRAMP Joint Authorization Board (JAB). More information can be accessed at: <https://www.salesforce.com/solutions/industries/government/overview/>

## Implementation Approach:

Team Stealth will employ a proven approach encompassing seven strategic tasks for configuring the CRT Case Management system and executing seamless data migration. Our methodology is grounded in agile execution, embracing iterative development over a monolithic approach, all while incorporating a feedback-driven paradigm. These seven distinct tasks are outlined below:

1. **Envisioning**: Initiating the journey by envisioning the end state and mapping out the path to success.
2. **Design**: Crafting a holistic blueprint that forms the bedrock for the ensuing agile execution.
3. **Agile Execution (Configure, Test, and Integrate)**: Embracing Agile Sprints, we iteratively configure, test, and integrate, ensuring flexibility and rapid adaptation.
4. **Agile Data Migration**: Employing Agile Sprints to execute meticulous data migration, safeguarding the integrity of critical information.
5. **Integrated User Acceptance Testing (UAT)**: Rigorously validating the integrated solution through UAT, ensuring seamless functionality.
6. **Training**: Equipping stakeholders with the knowledge and skills to optimize system utilization.
7. **Production Deployment and Operations**: Seamlessly transitioning to production and ensuring continuous system stability and efficiency.

This agile approach assures tangible value by fostering adaptability, transparency, and consistent collaboration. Our methodology's core tenets of iterative development and continual refinement provide a robust framework that guarantees the delivery of a high-performing and tailored CRT Case Management system.

**Task 1: Envisioning**

During the Envisioning Task, Team Stealth collaborates with CRT Stakeholders to conduct interviews and requirements-gathering sessions. This process defines the project's overall vision, success factors, functional scope, and detailed requirements. Input from stakeholders shapes a baselined set of requirements, forming the foundation of the Product Backlog for Task 3's sprints. This phase captures Case management, workflows, user interface, performance, reports, and more.

In parallel, Team Stealth establishes project management principles with key stakeholders, encompassing status reporting, communication methods, governance protocols, and risk registers. Notable activities within and between discovery sessions encompass:

* Planning transition to Salesforce Service Cloud-based ReconELM case management.
* Documenting core business processes beyond workflow diagrams.
* Conducting a product demo of ReconELM for familiarity and process enhancement.
* Aligning CRT terminology with Salesforce/ReconELM nomenclature.
* Identifying data sources like ICT Tech Stack and Web Time Stack for migration.
* Mapping CRT Case management process to Salesforce Service Cloud.
* Defining configuration requirements for user interface, objects, and templates.
* Outlining report, template, and dashboard needs.
* Identifying third-party system interface requirements.
* Establishing system security through user profiles, roles, and record accessibility.

This method guarantees seamless harmony between CRT's requirements and Salesforce Service Cloud capabilities. From these sessions, Team Stealth will document key decisions, sharing them with the group. After achieving consensus, a configuration workbook will be created, detailing the complete set of case management capabilities for development and deployment.

***Key Deliverables:***

* Transition Plan
* Security and Compliance requirements
* Project Timeline and Milestones
* Configuration Workbook

**Task 2: Design**

Guided by CRT stakeholders, Team Stealth will transform the configuration workbook into a Functional Design Document. This will encompass comprehensive case management, time tracking, and reporting specifics. Capabilities will be dissected, addressing functional gaps with stakeholder input. The design also entails conducting User Research and User Experience (UX) Design needed to create a user-centered and successful product. Please refer to the Appendix below for further details. Team Stealth will formulate a detailed sprint plan and roadmap for a successful deployment, yielding:

* Comprehensive Functional Design Document
* Gap Analysis with mitigation recommendations
* User research and user experience design results in User Personas, User Journeys, Contextual Research Data, Wireframes, Prototypes, Information Architecture, Style guides, etc.
* Detailed Sprint Plan aligned with full requirements.

***Key Deliverables:***

* Functional Design Document

**Task 3: Configure, Test, and Integrate**

As mentioned before, ReconELM is a COTS product for case management built specifically for Attorneys and Government Support Staff which can be easily configured to meet all of CRT needs. The platform also offers the flexibility to track time and other parameters as needed. As a part of this phase, all documented requirements for case management, time management, reports, etc. will be configured in ReconELM.

Team Stealth will use an Agile methodology consisting of short iterative sprints or work periods that each culminate in demonstrable product demos. This approach to implementation has proven successful with many of our customers because it allows for greater stakeholder feedback throughout the build process, enables greater transparency, and readily allows feedback to be incorporated into the next sprint. In this manner, DOJ will also be able to get continual, incremental, and frequent adjustments through regular engagement in the product demo sessions. Another benefit of the Agile methodology is that it will allow Team Stealth to test functionality in an iterative manner instead of waiting until all the functionality is fully configured. In this manner, issues surface earlier in the task and can be addressed with far less effort.

***Key Deliverables:***

* Deployment-Ready Modules
* UAT script

**Task 4: Data Migration**

Recognizing that a significant portion of CRT's data, specifically ICM Tech Stack and Web Time Tech Stack, currently resides within Oracle, Team Stealth acknowledges the strategic imperative of migrating this data to Salesforce's cloud-based platform. This migration constitutes a deliberate initiative to harness Salesforce's enhanced capabilities, scalability, and accessibility, effectively capitalizing on the advantages it offers.

The migration procedure encompasses pivotal stages, including meticulous data assessment, precise mapping, transformative modifications, and rigorous validation. The alignment of data structure and format with Salesforce's schema guarantees the integrity and quality of data. Augmenting this process, customized tools like Salesforce Data Import Wizard and Data Loader expedite the seamless transfer of data, seamlessly preserving data relationships and essential business logic.

The comprehensive approach involves thorough testing to ensure a smooth transition for end-users. The migration from Oracle to Salesforce involves a well-orchestrated, multi-step process meticulously executed by Team Stealth. Below is an outline of the steps we would undertake for seamless data migration:

1. Assessment and Planning:

* Identify and analyze the two data sets – ICM Tech Stack and Web Time Tech Stack
* Document the 60 tables to migrate including the field types, validation rules, etc.
* Determine the scope and priorities of the migration. Determine an archival strategy for data sets that need not be migrated.
* Determine data fixes, data cleansing, and data de-duping in the source data sets.
* Determine Data Cleansing, De duping rules from the source data

2. Data Mapping and Transformation:

* Create a mapping between the Oracle database tables and Salesforce objects/fields.
* Identify any data transformations needed to match Salesforce data requirements (e.g., data format, validation rules, etc.).

3. Data Extraction:

* Extract the data from Oracle using appropriate methods. We can use different methods such as Oracle Data Dump, Oracle Export Utility, SQL queries, etc.
* Perform any data cleansing and de-duping that has been identified

4. Data Cleansing and Pre-processing:

* Cleanse and transform the data as needed to ensure it adheres to Salesforce's data model and standards.
* Handle any data quality issues, duplicates, or inconsistencies.
* Prepare CSV files along with identified relationships that can be loaded into Salesforce.

5. Data Loading into Salesforce:

* Perform and test data migration in lower environments before doing it in production. Identify any challenges and failures during the migration. Document and resolve the identified issues.
* Perform the above steps multiple times until all data migration issues are resolved.
* Time the migration process for final cutover.

6. Testing:

* Perform thorough testing to ensure that the migrated data is consistent and usable.
* Verify that formulas, workflows, and automation rules that depend on the migrated data are functioning as expected.
* Verify that all fields from Oracle are mapped to the correct field in Salesforce.
* Ensure all relationships are maintained in the new system.

7. Go Live Data Migration: Perform a final round of data migration after User Acceptance Testing (UAT) fixes are validated and complete and before Go-Live occurs

**Task 5: Integrated User Acceptance Testing**

Once Team Stealth has completed the configuration and testing of the application, stakeholders will be provided access to test the entire application. The purpose of this UAT is to confirm the application has been configured per the requirements agreed to in the requirements documentation. This process will be lighter-weight and quicker when compared to traditional waterfall-driven deployments because stakeholders will have been involved in demo sessions throughout the implementation period. As a part of this task, Team Stealth will ensure that all CRT users are able to:

* Seamlessly perform their operations with an intuitive user interface developed based on research and user feedback
* Able to create and manage a case and all data related to cases in the system.
* All Case and Activity Management functions such as associating cases to multiple people, uploading documents, etc. are working as intended.
* Seamlessly enter time and track time by categories.
* Able to generate reports as required and prepare associated dashboards
* Send and received automated email notifications based on the workflow configured
* All Audit trail and activity log is captured as desired
* Identified system admins are able to manage the system and user interface efficiently.

***Key Deliverables:***

* UAT Findings and Fix Status
* Production-ready system

**Task 6: Training**

With the transition to a new system, training is critical to ensuring user adoption and usage. Team Stealth provides a suite of training sessions across different user types related to. As part of Task 1, Team Stealth will work with stakeholders to determine the appropriate number and type of training sessions required to successfully onboard CRD users.

***Key Deliverables:***

* Training Sessions
* Formal Training Materials

**Task 7: Production Deployment and Operations (ongoing)**

After any issues that surfaced during UAT are resolved and users are trained on how to use Salesforce, a formal Production Readiness Review is held. As a result of Team Stealth’s years of deploying enterprise systems into production, this Review serves as a stage gate to ensure all the requisite stakeholders have given the go-ahead for deployment. In addition to this checkpoint, Team Stealth follows version management best practices to track changes in configuration/code, support backup, and restore configurations if necessary.

In addition to the standard training provided for all users, below are some of the training that would be conducted based on role:

* Hands-on training on data entry and management for front-line staff
* In-Depth Case management training for Case Management Team
* In-Depth Reports and Analytics training for Management Staff
* System Admin Training for the IT team.

“Going Live” is accomplished by releasing the application for production usage. As part of this process, Team Stealth will establish communication plans (including release notes) that document the deployed functions and features.

***Key Deliverables:***

* Production Readiness Review
* Deployed System
* Release Notes

## Attachment 1 – DOJ CRT Functional Requirements Checklist

The DOJ CRT Functional Requirements Checklist has been revised with responses from Team Stealth. For our detailed feedback on DOJ CRT Case Management Functional and Non-Functional Requirements, please consult column E (**Stealth Solutions - Product meets Requirements**) and column F (**Stealth Solutions Comments**). The Excel file (**Attachment 1 - DOJ CRT Functional Requirement Checklist.1690491720282**) is embedded in the document and accessible by clicking the icon below.



# Staffing Plan

Team Stealth has meticulously assembled an exceptional Salesforce team, fully equipped, and dedicated to ensuring the utmost success of the case management implementation for CRT. With a wealth of expertise and experience in Salesforce implementations, our team comprises industry-renowned professionals who bring a diverse range of skills and knowledge to the table. Their deep understanding of Salesforce's capabilities, coupled with their strategic thinking and technical prowess, positions them perfectly to tackle the project's complexities and challenges

**Project Manager (Key Personnel – Time Allocated 100%):**

**Role**: The project manager will serve as the driving force behind the implementation project. Their responsibilities encompass overseeing the entire project lifecycle, from initiation to completion. The PM will establish project timelines, allocate resources, manage budgets, and ensure alignment with the organization's objectives. The PM will also be responsible for all reports indicated in the QASP section such as Quarterly status reports, transition plans, etc. The project manager will act as the main point of contact for stakeholders, facilitating communication between different teams and ensuring that project milestones are met on time.

**Key Skills**: Agile Practice, Product Management, PMO, Reporting and Tracking, Change management

**Technical Lead (Key Personnel – Time Allocated 100%):**

**Role**: The technical lead will provide the essential technical expertise required to design the Salesforce architecture. They will make critical decisions regarding system design, integrations, and customization to ensure a scalable and efficient solution. The technical lead's role is pivotal in guiding the development team, enforcing best practices, and addressing any technical challenges that may arise during the implementation. The Technical lead will prepare the developer documentation and perform user research as listed in QASP. The technical lead will also support DOJ enterprise cybersecurity architecture and programs.

**Key Skills**: Architectures, Configuration, Development, Continuous Integration and Continuous Deployment, API development and documentation, Login/Authentication Services

**Data Migration Specialist (Time Allocated – 100% until Go Live):**

**Role**: The data migration specialist will be responsible for planning and executing the migration of data from ICM Tech Stack systems and Web Time Systems to Salesforce. They will ensure data quality, map and transform data and conduct thorough validation to prevent data integrity issues. They will also ensure data errors and duplicates are handled prior to migration.

**Key Skills**: Data Extraction, Transformation, and Loading

**Subject Matter Expert (Time Allocated – 100%):** The SME's role is to bridge the gap between business needs and technical solutions. The SME will collaborate closely with the technical team to translate business needs into Salesforce functionalities. The SME will study both ICM Tech Stack and Web Time Systems in depth to ensure all required functions are captured and translated into the Salesforce platform. Their insights will guide the customization and configuration of Salesforce to ensure it aligns perfectly with the CRT’s workflow.

**Key Skills**: Salesforce Platform knowledge, Product Management and Strategy, Usability Research, User Experience Design, and wireframing.

**Quality Assurance (QA) Specialist (Time Allocated – 100%):**

**Role:** Maintaining a high level of quality is paramount in for all Team Stealth implementations. The QA specialist will develop and execute comprehensive test plans to identify defects and ensure the system meets all business requirements. The meticulous testing process will cover various aspects, including functionality, performance, security, and usability. The QA specialist's contributions will guarantee a smooth and error-free user experience.

**Key Skills**: Testing Salesforce Applications, internal and public-facing websites, and data migration validation.

**SF Developers (Time Allocated – 250%)**:

Role: The development team, consisting of 2.5 skilled developers, will be responsible for translating business requirements into tangible Salesforce solutions. They will ensure that all required functions and user experiences are configured in the Salesforce Service Cloud Platform. Most requirements will be built using configuration but based on user research, custom screens may be developed for better user experience. Collaboration with the technical lead and regular communication with other team members will be key to delivering efficient solutions.

**Key Skills**: Continuous Integration and Continuous Deployment, Building Public and Internal sites

In summary, the proposed staffing plan for this Salesforce implementation optimally distributes responsibilities among a team of experts. The project manager ensures overall coordination and stakeholder communication, the technical lead guides the architectural aspects, the data migration specialist manages data transition, the SME bridges the gap between business and technology, the QA specialist maintains quality, and the developers bring the solutions to life. This comprehensive staffing approach lays the foundation for a successful Salesforce implementation that meets the organization's objectives while ensuring a smooth transition to the new system.

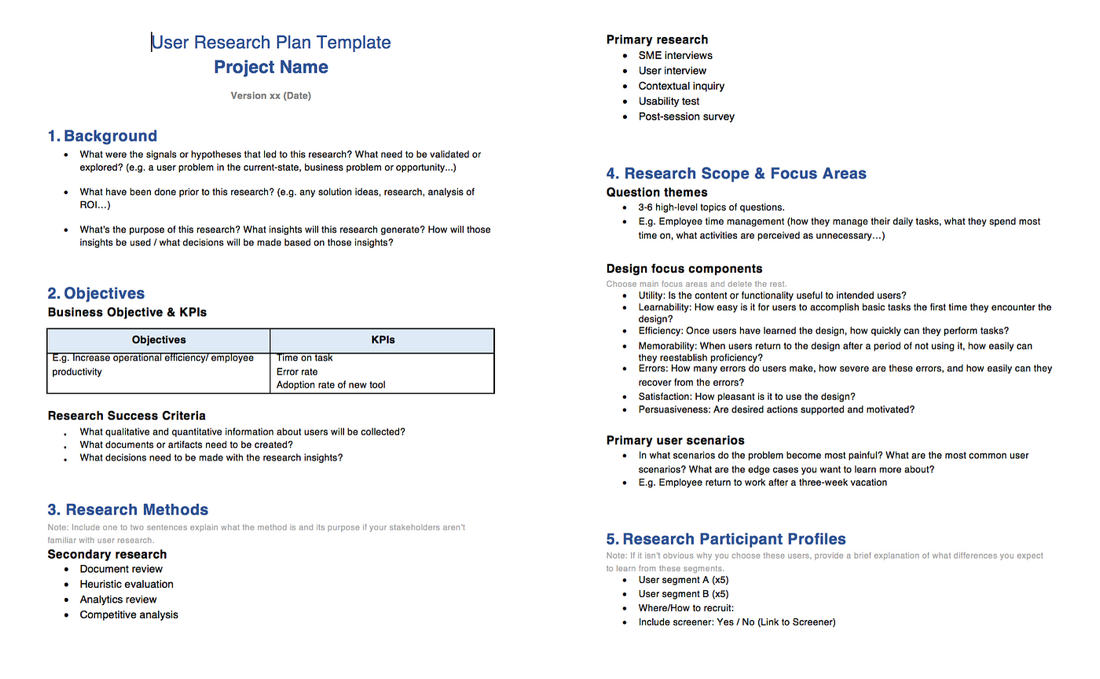
Appendix A – User Research and User Experience (UX) Design

Team Stealth will conduct comprehensive user research to deeply understand user needs and pain points, ensuring optimal value from the new case management system, and UX design activities aims at creating systems that provide positive and meaningful experiences for users. Our approach to user research/UX design for the CRT Case Management implementation involves the following steps:

1. **Define Objectives and Scope**: Clearly outline research goals, focusing on user experience and business value. This encompasses how various user groups, including field staff, IT staff, and case management staff, interact with the system.
2. **Identify User Personas**: Develop detailed user personas, representing distinct user types like Field Staff and Case Management staff, tailoring research to specific needs.
3. **User Journey Mapping**: Visualizing the user's interactions, emotions, and touchpoints across the entire experience to identify pain points and areas for improvement.
4. **Determine Research Methods**: Choose suitable methods, such as interviews, surveys, observation, usability testing, and usage data analysis, to comprehensively understand user behaviors.
5. **Create Research Materials**: Develop interview scripts, survey questionnaires, and usability testing scenarios, ensuring open-ended questions to uncover insights.
6. **Conduct Interviews and Surveys**: Gather feedback on current systems, pain points, tasks, and improvement suggestions from participants, documenting responses.
7. **Analyze Data and Identify Insights**: Analyze collected data for patterns, pain points, and recurring themes using tools like affinity diagrams and thematic analysis. Identify key user needs and improvement opportunities.
8. **Information Architecture**: Organizing and structuring content and features to ensure intuitive navigation and findability.
9. **Wireframing and Prototyping**: Creating low-fidelity sketches, wireframes, and interactive prototypes to visualize the layout, interactions, and flow of the user interface.
10. **Interaction Design**: Defining how users will interact with the interface elements, including buttons, forms, navigation, and feedback mechanisms.
11. **Usability Testing**: Conduct user testing sessions to gather feedback on the design's usability, identify issues, and validate design decisions.
12. **Accessibility Design**: Ensuring the design is inclusive and usable by people with disabilities, adhering to accessibility standards and guidelines.
13. **User Testing and Feedback**: Iteratively testing the design with real users and incorporating their feedback to refine and improve the user experience.
14. **User Training and Support**: Develop user guides, tutorials, and provide support to ensure users can effectively use the product or service.
15. **Collaboration and Communication**: Regularly engage with cross-functional teams, stakeholders, and users to align design decisions with business goals and user needs.
16. **User-Centered Evaluation**: Conducting post-launch assessments and analytics to measure user satisfaction, engagement, and identify areas for further improvement.

These activities collectively contribute to creating a user-centric and enjoyable experience, ensuring that the final product meets user expectations and business objectives.

The screenshot below shows a sample user research plan used by Team Stealth.



Appendix B – Resumes and Letters of Intent

On the following pages, Stealth includes resumes and letters of intent for the following proposed personnel:

* Vishnu Devarashetty, Program/Project Manager; and
* Akeem Shane, Lead Developer.

## Resume and Letter of Commitment – Vishnu Devarashetty, Program Manager

EXPERIENCE

Driven, result-oriented professional with 20+ years of proven performance in program management, leadership, client engagement, technical/non-technical stakeholder management, building teams from the ground up, delivering business value in grants management systems to federal and state clients such as DHS/FEMA, NOAA, HUD, and ACF. Deep understanding of traditional and Agile software development methodologies. Proven organizational capabilities in budget management, risk management, process development, and stakeholder identification. Skilled in detailed planning for optimized resource use, and schedule management with critical path based on precedents and dependencies working both in matrixed cross-functional and project-based environments. Extensive experience in API development for systems in development, coordinating with upstream/downstream system owners for their API and interface development. Excellent understanding of data flow/movement, multiple and complex data migration experience.

SKILLS

* Contracts Management
* Program and portfolio management
* Risk Management
* Stakeholder Management
* Program crisis management
* Business process re-engineering
* Agile, Scrum, Kanban
* Strategic Planning /technical and functional road map development
* Budget, Schedule, EVM, financial reporting
* System Requirements, API development
* Data Migration and Data warehouse, data movement within and across downstream/upstream systems
* Cloud-based development, CI/CD
* Visio, Jira, Contour, Microsoft Office, Project/Project Server, SharePoint

RELEVANT PROFESSIONAL EXPERIENCE

Program Manager / Director, FPT/Intellinet Herndon, VA

* Lead a global team of 75 resources for clients in 30+ countries.
* Streamline processes, optimized resource allocation, and established a clear roadmap for product development.
* Successfully manage challenges arising from concurrent product development and client integration.

Service Delivery Manager / Deputy Program Manager, Karsun Solutions

* Led Kanban Scrum Master for 11 teams (9 agile development, 1 AWS, 1 service desk) in a fast-paced environment
* Gathered complex business requirements for MVP and prevent scope creep
* Established, and monitor progress for program tasks, focusing on continuous improvement
* Managed integration, release lifecycle, data movement, APIs, Power BI analysis
* Provided weekly financial data for budget optimization.

EDUCATION AND CERTIFICATIONS

BS in Electronics and Communication Engineering

PMP Certification

CSM Certification

CASM Certification

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## Resume and Letter of Commitment – Akeem Shane, Technical Lead

EXPERIENCE

An experienced Salesforce developer with four years of experience. Is certified as a Salesforce Certified Administrator, Salesforce Certified Platform Developer I, and a Salesforce Certified Platform Developer II. Has an outstanding ability for problem-solving and critical thinking, as well as leadership qualities. Highly capable in building strong team cohesion which allows for an effective and timely accomplishment of any goal set forth.

SKILLS

* Extensive programming experience with Apex, SOQL, SOSL, Java, C,
* Python and SQL programming languages.
* Highly Proficient with the HTML, CSS, and JavaScript programming languages.
* Experienced with the C# programming language and the ASP.NET framework.
* Highly Proficient with the Agile Scrum Software Development Lifecycle methodology.
* Highly Proficient with GitHub and project management tools.
* Highly Proficient with Conga Composer Application.

RELEVANT EXPERIENCE

Salesforce Developer / REI Systems

* Integrates third-party Applications for documentation generation using an Application Programming Interface, which resulted in significantly reduced times in the overall end-user workflow.
* Designs and develops functionalities for a particular client while working for the implementation team as a software vendor, that were integrated into our overall product.
* Leads, designs, and develops large-scale components in the system, which because of their complexity due to being highly integrated with other parts of the system required tight-knit teamwork between the Development and the Quality Assurance teams.

Technical Specialist / Apple

* Give quick and efficient support to both new and current customers.
* Quickly assess the customer’s situation and be able to give either guidance or support in helping to resolve their situation.
* Provide personal training for the customer in basic operations of their Apple devices and Apple applications.

EDUCATION AND CERTIFICATIONS

Bachelor of Science, Double Major in Computer Science and Mathematics, University at Albany – SUNY

Salesforce Certified Administrator, Salesforce, 2020

Salesforce Certified Platform Developer I, Salesforce, 2020

Salesforce Certified Platform Developer II, Salesforce, 2020

Close-up of a letter of a contract

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