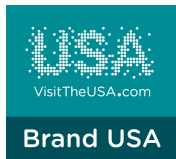




REQUEST FOR PROPOSAL

Systems Maintenance & Integration

October 27, 2017



PURPOSE

The purpose of this Request for Proposal (RFP) is to select a systems integrator that will enable Brand USA to further make use of its current Salesforce instance and the currently connected applications. In addition to common CRM functionality, the successful bidder will demonstrate how it can support Brand USA's operational complexities to automate processes and workflows in a user-friendly manner. The successful bidder will also be able to take a holistic look at Brand USA's systems ecosystem and issue software recommendations based on their expertise.

SCOPE OF WORK

Brand USA utilizes its funds to engage in a large range of marketing activities, including business to consumer (B2C) and business to business (B2B) advertising, content production, trade shows and event sponsorship. A majority of these activities are cooperative executions with U.S. destinations and suppliers and in-market retailers and media. Due to its unique business processes, the nature of Brand USA's operations requires a high degree of custom configuration.

The selected systems integrator will:

- Provide advisory services that relates to supporting the implementation of the existing systems ecosystem
- Support Brand USA's unique business needs efficiently while taking a holistic view into its current systems
- Consistent with Brand USA's procurement policy, aid in the business discovery process for third party applications that can be connected to Salesforce
- Analyze Brand USA's current software ecosystem and determine what applications should be incorporated or adjusted based on your expertise
- Collaborate with Brand USA staff to understand its operational complexities and configure the CRM system to best fit Brand USA's non-standard operations
- Create and manage the project roadmap to meet or beat deadlines
- Build, facilitate or apply existing interfaces with other Brand USA systems as specified in the subsequent Requirements section
- Implement and train Brand USA staff on any new applications and processes

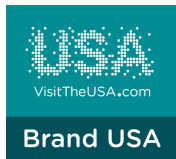
GENERAL REQUIREMENTS

Ability to support functionality with the following systems:

- Event Management – Ability to handle events with attendees ranging from 500 up to 5000
- Revenue generation process flow management - Ability to track contribution communications (emails, notes from calls), generate and store contract versions and addendums, receive alerts upon status changes
- Procurement and insertion order work flow management - Includes form creation, approvals and pushing data to Brand USA's Financial Management System (FMS), pulling/receiving data from FMS to provide up-to-date status
- Email integration with customizable parameters for user groups
- Display of departmental data stored in FMS via automated interface - providing access to invoice status, payment amounts, forecasts and budgets
- Ability to search contacts using a wide range of fields (city, company name, program, partnership status)
- Custom design template capability for the creation of newsletters or email communications
- Full access to system via mobile device. Supported Mobile Devices: At minimum - iPhone 4, 4s, 5, 5c, 5s, 6, 6s, iPad 2, 3, 4, 5; Google Nexus 9, 5, 4; Samsung Galaxy S5, S4, S3; Samsung Galaxy Tablet 4.7
- Supported Browsers: Current and previous versions of Chrome, Firefox, Safari, Internet Explorer

Existing Interfaces/APIs

- Customer Relationship Management system (Salesforce)
- Event Management System integration (Cvent)
- Financial Management System (Microsoft Dynamics GP, Paramount Workplace, BI360, Silverlight)
- Email (Microsoft Outlook 365)
- Brand USA's corporate website (www.TheBrandUSA.com which is built on Drupal)
- Digital Asset Management system (MediaValet)
- Email list management system (Mailchimp)
- File Storage System (Box)
- Social reporting tool integration (Sprinklr)



- API Integration with FMS (SmartConnect)
- Security Assertion Markup Language (SAML 2.0) compatible for use with OneLogin (Single Sign On (SSO) solution)

Additional desired capabilities

- Pulling/receiving data from external data vendors or sources, such as Google Analytics
- Experience developing/creating Salesforce Lightning Components

CORE OBJECTIVE

Provide strategic thought leadership on current systems architecture, identify any gaps, and fulfill Brand USA's evolving business needs.

Deliverables

- Deliverables can include Apex classes, Apex triggers, and new custom objects. All new integrations are expected to work with and enhance the current CRM instance.
- Project deliverables will vary in size and scope, and may include both strategic consultation and creative execution.

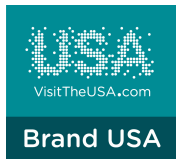
Action Plan

- Evaluate Brand USA's current systems ecosystem
- Identify areas of improvement
- Update any existing code that is not functioning as intended
- Determine which third party apps should be connected
- Create a road map for implementations with detailed timelines
- Develop the necessary APIs to connect the different systems to Salesforce
- Provide training to the user base
- Ongoing technical support and maintenance as necessary

QUALIFICATIONS

- Minimum of five years of operations
- Experience with clients that have global operations
- Experience with integrating Cvent with Salesforce





- Track record of delivering solutions for a range of business functions, including business development, sales, public relations, and marketing
- Strong references from large consumer brands currently utilizing your services

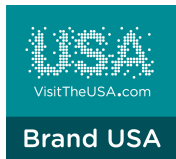
PROPOSAL FORMAT AND SPECIFICATIONS

For the purposes of this RFP, the bidder will provide:

- Project plan for the custom implementation of Cvent with Salesforce that includes:
 - 5,000 cumulative attendees list
 - Support for Surveys and Marketing campaigns within Salesforce
 - Best practices for integrating and visualizing the data
 - Business discovery details
 - Recommendations
 - Requirements gathering process
 - Project plan
 - Implementation timeline
 - Training/roll out schedule
 - Budget for the overall project

In addition, it is recommended that the proposals also include:

- Background information on your company including your current position in the marketplace and points of differentiation from other providers
- A past performance example of a Salesforce and Cvent integration
- Sample training documentation
- Please provide staff retention rates
- Staff bios of the team
- Answers to the following questions:
 - How do you work with third party APIs to best integrate?
 - What is your process for making user experience (UX) improvements?
 - What are your typical support response times?
 - What are your hourly rates by staffing/type of development?
 - Triggers, custom development, and development training
 - Data migration, data integration, training
 - General configuration, best practice guidance, project management



- What is your experience with Salesforce Lightning and creating Lightning Components?

BUDGET

Bidders must submit an appropriate and realistic budget, outlining the proposed cost of the goods and/or services for each of the activities/products proposed in response to this RFP. The budget must include costs for discovery, configuration, hosting, any connection/API costs, licensing, ongoing maintenance, any consulting and support fees.

For budgeting purposes, please assume the following:

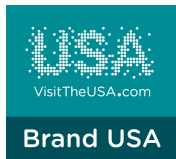
- 70 Salesforce Standard Licenses
- 40 Salesforce Company Communities Licenses
- 8 connected apps
- 5000 event attendees (cumulative)
- 15 types of relationships/products

MINIMUM REQUIREMENTS

Proposals must address each item listed, giving specific details of techniques to be used in achieving these requirements. Proposals may be rejected if minimum requirements are not met. All proposers wishing clarification of this RFP must submit questions in writing to Brand USA, no later than November 3, 2017 (due by 5:00 pm, EDT), and sent by email to rfpadmin@thebrandusa.com.

Costs for developing proposals are entirely the responsibility of the proposer and shall not be reimbursed by Brand USA.

1. Notice of Intent to Bid (Attachment 1) must be received by November 15, 2017 (due by 5:00 p.m. EDT). The notice shall be sent by email to rfpadmin@thebrandusa.com at the Brand USA office. The NOTICE OF INTENT TO BID, is nonbinding; however, it ensures the receipt of all addenda related to this RFP. Proposals will be accepted only from applicants who submitted a timely NOTICE OF INTENT TO BID.
2. RFP Responses must contain the following information:
 - a. Executive Summary.
 - b. Answers to the Proposal Format and Specifications.

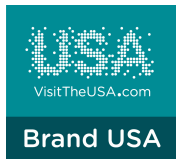


- c. **Services and Activities:** Provide description of the nature of the organization's services and activities. Note when the business was established, brief history and location. List the location(s) of the office(s) from which the primary work on this contract would be performed.
 - d. At least four examples of work that demonstrate your ability to deliver against the evaluation criteria below, including one example of an event management system integration with Salesforce.
 - e. Access to a Sandbox Environment for demonstration purposes.
 - f. **No Conflict of Interest:** Client relationships that could potentially be considered a conflict of interest must be listed.
 - g. **Contract Manager/Team:** Identify one individual on the proposer's account team who will manage the contract work. Identify the role of each member who will service the account. Current resumes must be attached for each person who would in any way be associated with this account.
3. **References:** Provide at least three references.
 4. **Budget/Rates**
 5. **Certification Form (Attachment 2)** must be signed and accompany all RFP Response submission.

TENTATIVE SCHEDULE

This tentative schedule may be altered at any time at the discretion of Brand USA. Brand USA reserves the right to reject any and all proposals, or any part thereof; waive an informality in the proposals and accept the proposal that best meets the needs of Brand USA.

A. Proposal Released	October 27, 2017
B. Written Questions (due by 5:00 p.m. EDT)	November 3, 2017
C. Written Questions Answered and posted to Brand USA Website	November 10, 2017
D. Notice of Intent To Bid Due (due by 5:00 p.m. EDT)	November 15, 2017
E. Proposal Due (due by 3:00 p.m. EDT)	December 1, 2017
F. Proposal Evaluation by Scoring Committee	December 8, 2017
G. Notification and Scheduling of Finalist Interviews	December 15, 2017
H. Finalist Presentation/Interviews	January 2 – 4, 2018
I. Notice of Intent to Award Contract and Public Posting	January 12, 2018



DELIVERY OF PROPOSAL

Proposals may be e-mailed to rftadmin@thebrandusa.com and sent by courier such as Federal Express, UPS, etc. to:

Brand USA Headquarters

C/O RFP Administrator

1725 Eye Street NW, Suite 800

Washington, D.C. 20006

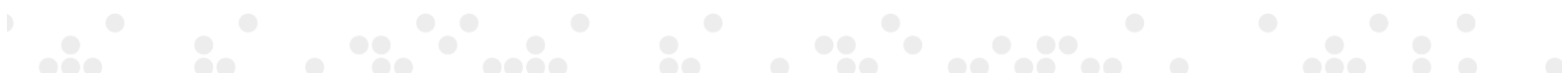
ATTN: RFP – Systems Maintenance and Integration

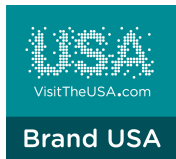
Phone: 202.536.2060

Email: rftadmin@thebrandusa.com

EVALUATION AND CONTRACTING

All proposals satisfying the requirements of this Request for Proposals will be evaluated to establish which of the providers best fulfills the needs of Brand USA and this project. This Request for Proposals in no way commits Brand USA to award a contract, to pay any costs in preparation of a proposal, or to contract for the goods and/or services offered. Brand USA reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with all qualified providers or to cancel this Request for Proposals. After awarding the contract, the schedule will include a period of collaboration between Brand USA and the selected Contractor to better define, elaborate upon, and fix the Contractor's final Scope of Work and general Terms and Conditions.





ATTACHMENT 1

NOTICE OF INTENT TO BID

Due: November 15, 2017

SEND TO:

Brand USA Headquarters

C/O RFP Administrator

1725 Eye Street NW, Suite 800

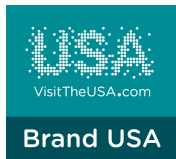
Washington, D.C. 20006

ATTN: RFP – Systems Maintenance and Integration

Phone: 202.536.2060

Email: rfpadmin@thebrandusa.com

NAME OF BIDDER / COMPANY:
CONTACT PERSON:
MAILING ADDRESS:
TELEPHONE:
FAX:
E-MAIL ADDRESS:
SIGNED:



ATTACHMENT 2

CERTIFICATION

Please include this statement as part of the Proposal

Certification Statement

By submission of this proposal and authorized signature below, Proposer certifies that the undersigned corporate officer has authority to bind the bidder to the terms of this Proposal and hereby certifies on behalf of the bidder that:

1. He/she has read and understands all commitments and terms of this Proposal.
2. The information contained in this Proposal is accurate.
3. Proposer's quote is valid for at least 120 days from the date of proposal's signature below.
4. Proposer understands that if selected as the successful Proposer, he/she will have ten (10) business days in which to complete contract negotiations, if any, and execute the final contract document. Date of execution can be extended by mutual agreement of contractor / Brand USA.

Authorized Signature

Typed or Printed Name

Title

Date

Official Contact

Brand USA requests that the Proposer designate one person to receive all communications for clarification and verification of information related to this proposal. Please identify this point of contact below:

Official Contact Name

Phone Number

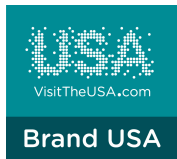
Official Contact Title

Facsimile Number

Email Address

Street, City, State, Zip





ATTACHMENT 3
FOR BRAND USA USE ONLY

Bid/Proposal: _____

Evaluated By: _____

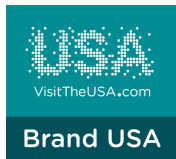
Date: _____

Proposal Evaluation Criteria

The evaluation committee will judge each written proposal based on the following criteria:

	MAX. POINTS	SCORE
1. Demonstrated ability to build custom Salesforce Instances	35	
2. Intuitive user experience	25	
3. Project Planning	15	
4. Training and support	15	
5. Cost	10	
TOTAL POINTS	100	





ATTACHMENT 4 – IF NECESSARY FOR BRAND USA USE ONLY

ORAL INTERVIEW / DEMONSTRATION CRITERIA

The evaluation committee may, if it deems necessary, select certain proposers for oral interviews and/or demonstrations. Interviews/demonstrations apply only to the top finalist(s), as determined by the evaluation committee. The oral interviews/demonstrations will allow finalists to demonstrate their understanding of the project objectives and to articulate their capability to meet or exceed the requirements of this RFP.

The evaluation committee reserves the option of conducting the oral interviews/demonstrations via teleconference, at the Brand USA office, at the finalist's and/or the proposed subcontractor's site, or other designated site.

The evaluation committee reserves the right to designate one or more members of the committee to perform the oral interviews/ demonstrations, if needed, so that grading of oral interviews/demonstrations may be done by fewer than the entire committee.

If interviews/demonstrations are not required, the maximum number of points is 100. If interviews/demonstrations are deemed necessary, the maximum number of points is 150.

If a finalist cannot meet on the designated interview/demonstration date, the evaluation committee reserves the right to disqualify the finalist as non-responsive.

The following criteria will be used for scoring the oral interview/demonstration:

ORAL INTERVIEW/DEMONSTRATION CRITERIA	MAX.	SCORE
1. Overall fit of proposed solution to Brand USA requirements	25	
2. Ease of configuration and use of proposed solution	10	
3. Implementation methodology and tentative project plan	10	
4. Resources required	5	
TOTAL POINTS	50	