State of Hawaii Office of Enterprise Technology Services (ETS)
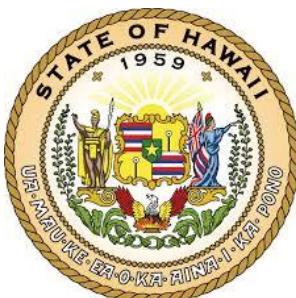
PowerObjects

Dynamics CRM Portal RFI Response – For Public Inspection

August, 14th 2017

Presented By:

Bill Del Riego - PowerObjects

Contents

Service   Support   Education   Add-Ons

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Executive Summary

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PowerObjects Company Profile

PowerTeam, LLC, dba PowerObjects, an HCL Technologies Company, was founded in 1993 and has operated for over 20 years as a successful professional services firm. **PowerObjects, an HCL Technologies Company**, is widely recognized globally as one of the most successful, innovative and award winning Value Added Services partners for customers that choose to make an investment in the Microsoft Dynamics 365 platform.

PowerObjects currently has over 350 employees and supports over 1,175 customers on the Microsoft Dynamics 365 platform from small non-profit organizations to Fortune 100 companies. PowerObjects as a company is 100% focused on adding value to Dynamics 365 through our "Four Pillar" approach of providing our customers with Services, Support, Education and Add-Ons. Our fanatical focus on being the best in the world at one thing, Dynamics 365, has provided us a guiding light in all that we do.
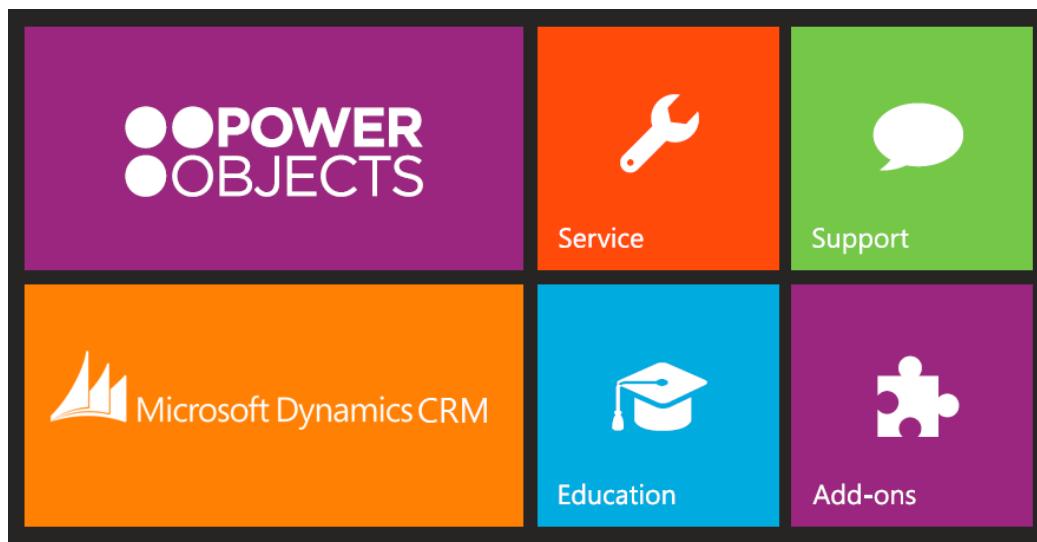
HCL Technologies

PowerObjects was acquired[*] by HCL Technologies in October of 2015. PowerObjects' parent company, **HCL Technologies,** is a leading global IT services company working with clients in areas that impact and redefine the core of their businesses. Since its emergence on global landscape after its IPO in 1999 and listing in 2000, HCL Technologies, along with its subsidiaries, today operates out of 31 countries and has consolidated revenues of US$ 6.1 billion, as of September 30, 2015. HCL focuses on 'transformational

outsourcing', underlined by innovation and value creation, offering an integrated portfolio of services including Enterprise Digitalization, Internet of Things, Engineering Services Outsourcing and Next Generation IT Outsourcing that focuses on transformation-led infrastructure services, applications services and business services. HCL leverages its extensive Global delivery capabilities and integrated innovation labs across the world to provide holistic, multi-service delivery in key industry verticals including Financial Services, Manufacturing, Telecommunications, Media, Publishing & Entertainment, Retail & CPG, Life sciences & Healthcare, Oil & Gas, Energy & Utilities, Travel, Transportation & Logistics and Government. With 105,000+ professionals from diverse nationalities, HCL Technologies focuses on creating real value for customers by taking 'Relationships Beyond the Contract'.

*More on acquisition:
http://www.hcltech.com/press-releases/hcl-technologies-acquires-crm-services-provider-powerobjects

Project and Client Management

PowerObjects' implementation plan is based on our Proven Process (see graphic below), which is the proprietary methodology used by PowerObjects implementation team. The three implementation phases of a typical PowerObjects led project are:

- Plan for Success
- Design, Build & Validate
- Train & Deploy

The Plan for Success phase follows a typical waterfall methodology, where functional and technical specifications are developed. However, since Microsoft Dynamics 365 is so flexible to configure, the Design, Build, and Validate phase is generally more iterative where the completed configuration is reviewed by the core project team and adjustments are made based on their feedback. PowerObjects will work with Hawaii.gov to determine the best approach for delivery style and preferences. In general, we do as much of the work, including the list below, onsite and augment that with some level technical and functional work remotely:

- Plan for Success Design Sessions with Client Teams
    - Note: Follow-up clarification meetings are done remotely throughout the documentation process.
- Review of the Functional and Technical Specifications and Presentation of the Detailed Project Scope Document and Project Plan
- Core Team Testing Training
- User Acceptance Testing Training
- End User Training
- Go-Live Pilot Support

A detailed project plan and schedule will be developed upon completion of the Plan for Success phase and schedules will be coordinated between Hawaii.gov and PowerObjects. The detailed project plan and schedule will include detailed tasks, assignments and agreed upon timelines.

EVALUATION PROCESS → PLAN FOR SUCCESS → DESIGN, BUILD & VALIDATE → TRAIN & DEPLOY → LIFECYCLE

EVALUATION PROCESS	PLAN FOR SUCCESS	DESIGN, BUILD & VALIDATE	TRAIN & DEPLOY	LIFECYCLE
Ask – Listen – Learn	Project kickoff meeting	Deploy the base system	System administrator training	Technical support
Diagnose & document	Business requirements & documentation	Create organization structure	Small change management	Small change management
Solution demonstration	Define the team & roles	Define users, roles, & security	Additional training	Additional training
Proposal presentation	Create project plan & schedule	Model the organization & processes	Additional phases and projects	Additional phases and projects
Reach agreement	Communicate project to team	Design & build workflows & reports		
		Data migration		
		Validate & test the system		

Training and Reinforcement

PowerObjects' approach to training is always to provide role-based, process-focused training to employees that helps them do their job and understand their new expectations. It's critical to develop materials that can provide consistent training for each release, as well as onboarding for new employees.

Use a repeatable training path

- Role-based
- Consistent
- Blended Learning
- Measurable
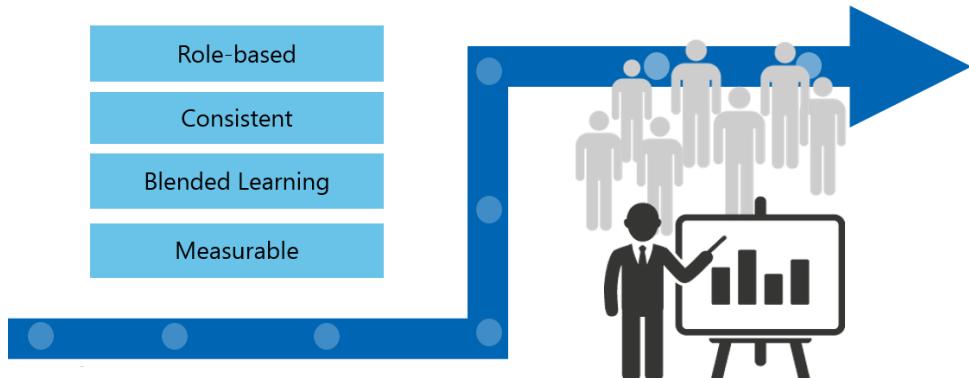
In the event that Hawaii.gov's internal teams do not have the resources to execute on training, PowerObjects' Education team can work with corporate training to develop content in line with its branding and quality standards. PowerObjects can support the workload in the following ways:

Developing training materials: Materials such as instructor PowerPoints, instructor guides, participant guides, and references materials such as quick references guides or eBooks.

Videos or eLearning: PowerObjects can assist with any part of the process from scripting to storyboarding to development of video or eLearning content.

Conducting training: PowerObjects may train a group of trainers or facilitate end-user training whenever needed.

Training and adoption measurement: PowerObjects may write evaluation questions or execute training and adoption evaluations before or after deployment.

PowerObjects understands that training is often the face of the program. PowerObjects' Education team works behind the scenes to make sure training and deployment is a huge success.

Project Management and Staffing Approach

As a part of PowerObjects' Proven Process, a PowerObjects team will be constructed with the appropriate skills and abilities to ensure the success of the project. There are many factors to take into consideration when constructing a team – customer skills, project temperament, project complexity, industry, etc. – PowerObjects takes pride in ensuring the right team is assigned. A PowerObjects Project Manager will be the primary point of contact during the project with respect to project status reports; updates and issues; scheduling and coordinating meetings; gathering needed client information and documentation. Any questions or concerns as they relate to the project status, schedules, work already performed or yet to be performed, etc. should be first directed to the PowerObjects Project Manager.

PowerObjects Team

Hawaii.gov will be working with a team that shares information and contributes to the greater good. Even though you will have an assigned team at PowerObjects, that team has access and contribution from the greater PowerObjects community at all times. Employees at PowerObjects say the best thing about working here is the team. The number of employees and office from which they work will vary throughout the project based off the specific needs. A PowerObjects' project manager will be assigned to the project to manage resource allocation from the PowerObjects side, based on the needs of the project.

Response to Questions:

a. From your past experience, has the State identified all the major components necessary to pursue an RFP for a new Internet portal provider? If not, please provide information on other necessary components.

In looking across the landscape of customers who have modernized citizen and consumer-facing portal technologies, 4 key components stand out:

- The Portal itself, as a manifestation of a modular, responsive technology that adapts to any device, is ADA compliant, and is a low administrative overhead.
- A backend Customer Relationship Management (CRM) platform, to help aggregate the data as well as citizen/consumer interactions being processed through the Portal.
- A Master Data Management (MDM) technology and approach to help unify the data behind the common platform, across the State and even down into the County and City.
- A content and marketing management solution to drive, track and enhance the content being delivered to citizens and consumers.

b. Are there potential problems and risks that the State may encounter during this project?

Some of the biggest risks that we see in a large-scale deployment revolve around existence of revenue percentages collected by a 3rd party technology provider, as well as negative impact to highly fluctuating or unknown public access. Additionally, projects of this size and scale invariably necessitate a phased approach, which means that for a period of time, the State and agencies will operate in a mixed, integrated environment with both new and legacy systems in place. Finally, even with the modernization of the Portal and backend completed, integrations to legacy systems will remain intact; this necessitates a suitable Portal and backend technology that is open enough to integrate with.

Revenue: We believe that in the current technology landscape, public entities should, and do have the ability to recoup the maximum amount of revenue based on transactions. Now, one factor that will always be in play is the necessity of having a payment processor, such as a local or national bank. However, this should be the only revenue leakage in the Enterprise model. We operate, and our technologies operate, in a fashion that does not charge a percentage of fees based on revenue, but rather in a fixed cost model. The State is responsible for providing the payment processor, including negotiating the percentages that processor charges, and then simply embeds that payment processor gateway within our solution, under full control of the State.

Fluctuating Access: We frequently see that public agencies, when dealing with a public Portal, receive widely varying usage month to month; it also necessitates the ability for large groups of individuals to create accounts with the State to authenticate themselves for services. To mitigate this risk, we utilize technologies and costing models that do not charge a per-individual (citizen) account fee, but rather allow any number of external individuals to create accounts at no cost.

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This can readily help the State in terms of keeping track and paying for varying numbers of active individual accounts.

Mixed Environment/Ongoing Integration: As with most any large-scale Enterprise project, there will be need for numerous integrations and cooperation of systems both during and post implementation. The major risks here can include putting in a technology that is in a proprietary or less popular coding language, that has limits or caps on integration API calls, or requires custom code to do anything. Our customers have significantly reduced that risk by using a platform technology that is built on a common language (.NET), and supports open, widely accessible API's (such as OData v4). Additionally, we recommend solutions that do not place governors, limits, or additional charges for API calls; this can quickly become a significant unknown cost to the State once integrations are setup.

c. Based on your review of the requirements described, can you describe the strengths, weaknesses, opportunities and threats associated with a solution(s) you suggest?

Strengths

- Serves the Public: A modern, robust, proven solution to address the most key challenges in a public-facing deployment today.
- Cost effective: Known, fixed costs for implementation and ongoing subscriptions.
- Productivity: Microsoft's tightly co-developed platforms mean that customers like the State can take advantage of a solution that not only helps drive a public Portal, but also seamlessly integrates on the backend with the State's O365 services.

Weaknesses

- A primary challenge for this approach is the possible need for a 3rd party robust marketing and campaign management tool. If the State, as part of a public outreach initiative, would like to cohort, segment, or deliver rich content in a managed way, we would recommend that a technology like Adobe be considered. While not part of the de facto platform, risks here are minimized by a close partnership between Microsoft and Adobe, as well as Power Objects' experience in delivering both technologies.

Opportunities:

- With technology from a company like Microsoft which is best in breed for multiple platforms, our customers can see many robust opportunities to better serve the public by utilizing plug and play services such as Azure Machine Learning, Cortana Analytics, Bot Services and more. Rather than fragmenting to multiple vendors, this unified approach allows our customers to take advantage of these advanced services from the same vendor, as part of the same infrastructure.

Threats:

- With a focus more on product, Microsoft does not for the most part venture into deeply vertical solutions, and instead looks to the partner ecosystem to provide relevant IP. Depending on the customer need, this could provide a layer of abstraction between the customer and Microsoft.

d. Can you provide a preliminary plan and timeline on how the existing services could be migrated to a new vendor without interrupting services?

High Level Workloads

- Deploy Microsoft Dynamics 365 Online
- Deploy Microsoft Dynamics 365 Core Entities for Customer Management: Account, Contacts, Activities
- Deploy Microsoft Dynamics 365 Core Entities for Customer Services: Cases, Service Level Agreements, Contracts, Queues, Entitlements, Email to Case, and Routing Rules
- Deploy Microsoft Dynamics 365 Core Entities for Project Services: Projects, Project Templates, Project Tasks, Resources, Organizational Units
- Deploy Microsoft Dynamics 365 Custom Entities: Annual Business Filings, New Business Registrations, Electronic Tax Filings, Camping Permits, Hunting and Fishing Licenses, Sex Offender Registry, Criminal History, Jury Pool Information, OTHERS
- Deploy Project Services for Dynamics 365
- Deploy and integrate Microsoft SharePoint

Channels

- Portal to case
- Email queues
- Phone

Data Migrations

- Flat file migration using the Dynamics import wizard of existing data.

  - Accounts, Contacts, Cases, Annual Business Filings, New Business Registrations, Electronic Tax Filings, Camping Permits, Hunting and Fishing Licenses, Sex Offender Registry, Criminal History, Jury Pool Information, OTHERS

Deployment Approach

Resources		Plan for Success				Design/Build/Validate								Train & Deploy				
							Weeks											Totals
On-Shore	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	2770
Project Director	8	8	8	8	8	8	4	4	4	4	4	4	2	2	2	2	80
Project Manager	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	40	640
Business Analyst	40	40	40	40	40	40	40	40	40	40	40	10	40	40	40	40	610
Functional CRM Consultant					40	40	40	40	40	40	40	10	40	40	40	40	450
Technical CRM Consultant/Developer			40	40	40	40	40	40	40	40	40	10	40	40	40	40	530
Solution Architect			40	40	20	20	10	10									140
Trainer			40	40	40	40							40	40	40	40	320

Duration: 4 months

- Plan for Success: 1 month
- Design, Build, & Validate: 2 months
- Test & Deploy: 1 month

Platform Requirements

PowerObjects uses core Microsoft Dynamics 365 features such as currency, regulation, time zone, and date and number formats. Additionally, full multi-currency capabilities are supported (any number of transaction currencies and a base currency for financial/reporting roll-ups). Microsoft Dynamics 365 is multi-lingual and currently available in 45 languages. Microsoft Dynamics 365 also has full support for multibyte and Unicode text.

In Microsoft Dynamics 365, email can be matched against various attributes, including sender and subject, in order to deliver to the correct individual, team, or queue. Workflow in Microsoft Dynamics 365 can be designed to route the email messages according to a customer's business practice or treat email with certain status. The status of email is automatically tracked from receipt. Email can be tracked using a tracking token (which can be turned on or off), or through email smart matching, which help ensure that each email thread is being handled by a single person or team. Microsoft Outlook and Microsoft Exchange are tightly connected to Microsoft Dynamics 365 so that email messages, interactions, escalations, and associations within Microsoft Dynamics 365 are available directly within Microsoft Outlook.

Org. and Functional Support

PowerObjects works with the state of Hawai'i to define the proper Org. and Functional support. This allows for the services business to support and enable various functions within different parts of the organization such as management and project services. This would require integrations or additional configurations in order to enable the functional support provided by the services business.

Non-Functional Requirements

Dynamics 365 by Microsoft offers 99.9% uptime across all geographies with disaster recovery available via Microsoft SLA. Locally, the Dynamics 365 security model can be configured per role, team, or BU to provide access only where FIS requires. Additional field level security can be layered atop this where necessary.

Governance

PowerObjects is committed to a transparent relationship with the state of Hawai'i during project implementation and support. PowerObjects will work directly with the state of Hawai'i business and IT leads to provide status reports and review requirements for design and test cases. We will also manage any issues during implementation and escalate appropriately.

e. Can you provide any ideas or suggestions about how such problems and risks should be addressed in an RFP for Internet portal services?

PowerObjects is certainly available to assist in the creation of your RFP such that is covers all relevant areas/topics and solicits the appropriate information required for Hawaii.gov to adequately evaluate the participating partners and their respective responses. It's a service we provide free of charge and is something many of our customers have taken advantage of over the years with great success.

f. In order to determine the feasibility of developing a new Internet portal solution, can you provide a "ball park" cost estimate associated with the proposed solution(s) identified in your response, including start-up costs, implementation costs, maintenance, etc.? The information will be used for planning purposes only and should not be construed as part of any future RFP solicitation.

Microsoft Dynamics CRM Professional Services Estimate for: State of Hawai'I (ETS)	Project Totals	
Description	**Est. Hours**	**Total***
Project Communication	**Project Communication**	
Project Management - Project Planning, Communication & Guidance	360	$ 59,400
Plan for Success	**Plan for Success**	
Design and Requirement Gathering, Review Meetings, Detailed Project Scope and Schedule	368	$ 60,720
Design and document **Training Plan** for project training sessions	36	$ 5,940
Design Documentation: Functional Design	184	$ 30,360
Design & Build	**Design & Build**	
Dynamics CRM System Setup and Validation: D365 online for customer and project services, SharePoint, Yammer	12	$ 1,980
Create **Organizational Structure**: Business Units, Users, Teams, and Security Roles	8	$ 1,320
Design and Configure **Entities, Attributes, Forms, Views, and Business Logic**: Accounts (8 hours), Contacts (8 hours), Activities (8 hours), Case (8 hours), Service Level Agreements (8 hours), Contracts (8 hours), Queues (8 hours), Entitlements (8 hours), Email to Case (8 hours), Routing Rules (8 hours), Projects (8 hours), Project Templates (8 hours), Projects Tasks (8 hours), Organizational Units (8 hours), Resources (8 hours), Annual Business Filings (4 hours), New Business Registrations (4 hours), Electronic Tax Filings (4 hours), Camping Permits (4 hours), Hunting and Fishing Licenses (4 hours), Sex Offender Registry (4 hours), Criminal History (4 hours), OTHERS (20 hours)	172	$ 28,380
Setup and Train on **PowerPacks**: <PP list>	0	$ -
Design and Build **Processes**: This is a project allowance because no specific workflows, dialogs, or business process flows have been defined.	86	$ 14,190
Design and Build System **Dashboards and Charts**: Assumes 5 dashboards with charts and/or list views	20	$ 3,300
Design and Build **SSRS** or **PowerBI Reports**: N/A	0	$ -
Design and Build **Office Templates**: N/A	0	$ -
Design and Build **Data Migration** and Transformation: Assumes migration of existing accounts, contacts, cases, annual business filings, new business registrations, electronic tax filings, camping permits, hunting and fishing licenses, sex offender registry, criminal history, jury pool information, and OTHERS via flat file using the standard import wizard. Assumes each entity has no more than 50k rows of data. (15 entities)	240	$ 39,600
Design and Build **Integration** to Other Systems or Datasources: Assumes ZERO integrations	0	$ -
Design and Build Other **Customizations** (i.e. portals, mobile applications, scripts, plugins, custom user interfaces, and other extensions) as required: ****Employee Self-Service Portal (no more than 5 pages) (250 hours)** ****Customer Self-Service Portal (no more than 5 pages) (250 hours)** ****Configure PSA (200 hours)**	700	$ 115,500
Validate	**Validate**	
Design Review, System Validation, and User Testing and Feedback Meetings	184	$ 30,360
Train and Deploy	**Train and Deploy**	
Prepare for and deliver **Knowledge Transfer** session(s) as required: General knowledge transfer, Application System Administration	40	$ 6,600
Deliver formal **Training** as identified: Functional Overview with train-the-trainer	140	$ 23,100
Create **Training Materials** for end users:	140	$ 23,100
Deployment	40	$ 6,600
System Settling/Go-Live Support:	40	$ 6,600
Total Services Estimate (actual allowance to be determined in 'Plan for Success')	**2770**	**$ 457,050**

g. As an alternative to using or relying on just one vendor for the solution, are there possible solutions using a combination of vendors, where the State would interface with a main vendor and the others would be subcontractors or independent contractors? If so, please describe.

We have frequently seen projects implemented with a variety of vendors, in a prime/sub fashion. This could be on a single technology and module, such as the Portal development, or CRM development, where a prime vendor provides the bulk of the resources. Sub vendors can then provide more geographically proximate resources, for example. Additionally, projects that involve multiple technologies can benefit from multiple vendors, where they are each experts in their own module that comes together to present a whole.

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h. Do you have any additional comments/information that you feel would be beneficial to the State in deciding on a solution for the services outlined in this RFI?

PowerObjects understands that there are always multiple approaches to a project of this nature and we're excited to come sit down with you and explore all possibilities for a solution that meets your needs.