

Request for Information for Covered California Customer Relationship Management (RFI# 2017-01)

Questions and Answers

#	RFI Reference	Question	Answer										
1	N/A	Is the team that will be utilizing the CRM on Gsuite or another email client?	Covered California utilizes Office 365 for its email client										
2	N/A	What is the breakdown of users by group i.e. Call Center vs other staff	<table border="1"> <thead> <tr> <th>Profile/User Type</th> <th>Approx # of Users</th> </tr> </thead> <tbody> <tr> <td>Admin</td> <td>10</td> </tr> <tr> <td>Help Desk</td> <td>25</td> </tr> <tr> <td>Phone Rep (including supervisor, chat, etc)</td> <td>2000</td> </tr> <tr> <td>Other</td> <td>200</td> </tr> </tbody> </table>	Profile/User Type	Approx # of Users	Admin	10	Help Desk	25	Phone Rep (including supervisor, chat, etc)	2000	Other	200
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3	RFI document, Attachment B - Vendor Checklist, Self-Service/Chat, Email, Collaboration Tools and Integration`	Is "Virtual Customer Assistant" for the web channel, mobile, and/or CTI? Can the State please provide more details?	Covered California vision is for the "Virtual Customer Assistant" to be available through coveredca.com which is a responsive webpage. Our coveredca.com is hosted in Azure where as the CalHEERS application is hosted by Accenture. We are also looking at how to implement this across multiple channels.										
4	RFI Document, page 4, 3.1 Understanding Covered California	The RFI implies integration to CalHEERS. Can the State outline what level of integration is required for the CRM? Does the state have an existing middleware that can be leveraged for the integration? What other existing systems need to be integrated with the CRM solution?	<p>Covered California would like to be able to ingest information received from CalHEERS including Customer information. The CalHEERS solution is an Oracle based product. We are currently working off of a weekly extract that is fed through Oracle EDQ to Oracle Service Cloud.</p> <p>Our goal would be to have a real time real time updated with the CalHEERS System.</p>										

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5	RFI Document, Attachment B, page 7, Attachment A Page1	What Cisco products and versions is the State running?	<ul style="list-style-type: none"> •The IVR system includes the Cisco Unified Contact Center Enterprise 11.5, Cisco Voice Portal (CVP) 11.5 and utilizes the Cisco Finesse desktop •The IP Telephony system includes the Cisco Unified Communications Manager and related IOS devices (gateways, switches, etc.) as well as Cisco Unity system for voice mails
6	RFI Document, page 8, RFI Format and Submission	Can the State please increase the page limit by 15 additional pages? This will allow vendors to provide completed responses to each of the State's questions and requirements in Attachment A and Attachment B. Can the Attachment B matrix not be factored into the page limit?	The RFI has been updated to show the additional page limits as well as Attachment B not being factored in the total page count.
7	N/A	There are multiple ways the State's requirements can be achieved depending on the selected CRM platform. The Attachment B is asking for third-party and add-ons to be indicated. Are specific third-party apps and/or add-ons requested to be proposed during this RFI response or just examples of these capabilities or options of these capabilities? Will the subsequent RFP for solution implementation services take these into consideration for acquisition at that time?	Covered California is looking to the vendor community for guidance on any necessary third party applications or add-ons that may be necessary. This will enable Covered California to ensure that any and all budget considerations are known for planning purposes.
8	Attachment A, Vendor Questions, #3	Is the State willing to implement an on-premise CRM solution? Does the State have a preference for Cloud or On-Premise?	Covered California assumption is that the solution would be in the cloud. If the solution was needing to be on-prem Covered California would need to know what the hardware spec would be for planning purposes.

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9	Attachment A, Vendor Questions, Technical Criteria #4	If a Cloud deployment, is it sufficient to deliver the solution in a FedRamp-certified hosting facility? Do FedRamp requirements pertain only to cloud solutions?	Cloud solution must be hosted in a certified FedRamp hosting facility as a certified facility would meet the security requirements/controls and compliance of MARS-E and Nist800-53 publication standards. FedRamp requirements pertain to Cloud Service Providers Only. If the solution is not cloud hosted it must meet MARS-E Security requirements.
10	Section 9 – Demonstration	How much time will be allocated for the proposal demo?	Covered California is planning on allowing a maximum of 4 hours for each demo. Vendors must provide a script for the demo, they should also plan for 10 minutes of introduction, and 20-40 minutes of Q&A.
11	Attachment A, General Question, item 8	Can you provide a typical use-case for both an internal and an external user?	We currently do not have a use case for this, Covered California is exploring the option of a mobile application for internal and external users. We would be interested to see the possible use case with allowing external users to review case status' and previous interactions with Covered California. We would also be interested in seeing how a mobile application could be used to assist customers through an external knowledgebase.
12	Attachment A, General Questions, items 9	Are you currently subscribing to both Social Media Marketing and Social Customer Service by Lithium?	Yes, Covered California currently subscribes to Lithium to handle Social Media Marketing and Social Customer Service.
13	Attachment A, General Questions, items 9	Which Sprinklr tools are you a subscriber (content marketing, advertising, etc.)?	Covered California no longer uses Sprinklr. It has been removed from the RFI

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14	Attachment A, General Questions, item 9	Who are the users for Lithium and Sprinklr (i.e. – call-takers, social media team, etc.)?	Lithium is used by the Social Media team and does not flow to the current CRM platform. Sprinklr is no longer used by Covered California.
15	Attachment B., item 16	What is your desired outcome of the ‘classification and association’ of problems (e.g. – To provide a suggested solution or to better track calls)?	Covered California is looking to see if it is possible for the call takers to be able to receive real time guidance on what to do on a call i.e. if a consumer calls in requesting assistance with resetting a password the system (for example a virtual employee assistant) would assist them in the steps they would need to complete. Also, for the analytics component that would be able to predict response and what to do on the call.
16	General	Are there any healthcare provider interactions with the CRM?	There are currently no healthcare provider interactions with Covered California.
17	RFI – Conceptual Solution/Proposed Services, Page 7	Can you tell us more about the Cisco platform for the call center? What are the core capabilities that you would like integrated with the CRM?	See question #5 Covered California would like to see at least the following to be able to integrated with the CRM Solution: <ol style="list-style-type: none"> 1. Delivered a personalized and effortless experience to our consumers 2. Increase Self Service and containment options 3. Improve consumer satisfaction, including the use of CTI integration. 4. Increase transactional efficiencies 5. Enable proactive outbound campaigns.

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18	General	How is authentication of users validated on the Covered CA side if a customer calls in? Is there any identity and access management solution in place that integrates with the call center application to authenticate a customer's identify at point of interaction?	For existing customers authentication is first completed through the IVR which includes a web service to CalHEERS. The authentication information is passed to the SCR (Service Center Representative) with differing colored CTI Banners notifying them of the customers authentication. The SCRs will still validate who they have on the line utilizing CalHEERS which is the system of record.
19	Attachment A General Questions, Question 9	Can you describe more about how you are using Lithium and Sprinklr within Covered CA? Are you using both simultaneously for the same tasks, or do you use them differently? What do you like about the solutions and what features do you wish were a part of the solutions that are in consideration for the CRM interactions?	Covered California no longer utilizes Sprinklr. We subscribe to Lithium's Social Media Management tool for customer service interactions, and Lithium Reach, to schedule and analyze content.
20	General	Will the new CRM system also be used to manage Covered CA's agents and community partners? Are there any different requirements for managing those partners and users than from managing customers?	Yes, the CRM System will be used to track Calls to the service centers from Agents and Partners. There is a need to be able to have a hierarchy of agent/partner to consumer which currently does not exist in the CRM platform.
21	Attachment A – Technical Criteria Question 10	You mention integration with Oracle Eloqua. Can you describe the functions that Oracle Eloqua is used for at Covered CA, what CRM integration points you are most interested in?	Eloqua is used by our marketing team for campaigns along with CalHEERS to deliver notifications to consumers that they need to log in and view with in the CalHEERS Portal. We are interested in tracking outbound items to the consumer, this way when a consumer calls in the SCR will be aware of what they may be calling about.
22	General	Are you currently doing customer surveys? What tools are you using to send surveys and aggregate the responses?	Currently the survey function is used as an end of CalHEERS Application survey which is hardcoded at the end of the CalHEERS Application. The survey tool is built in to the Oracle Service Cloud platform. Currently the survey contains 10 questions.

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23	Attachment B – Requirement 27	Is English the only language that needs to be supported through Chat?	No, currently Covered California utilizes English and Spanish chat. Question #28 has been added to Attachment A regarding chat functionality. Covered California would also be interested in researching other language options to better assist customers. Question #12 has been added to Attachment A, General Question, requesting additional information regarding additional language functionalities.
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