



**Responses to Inquiries
RFP 25-05
CRM Training**

July 25, 2025

NOTE: The Appendix F Excel spreadsheet has been revised. Please refer to the revised RFP documents at:

<https://www.in.gov/inprs/procurement/quoting-opportunities/>

1. Section 1.7 indicates electronic submission via email but does not specify acceptable file formats. Could INPRS confirm which file types (e.g., Word, PDF, Excel) are permitted?

Answer: All file types specified are permitted.

2. Section 1.7 does not state any maximum email attachment size. Could INPRS specify any size limit for attachments?

Answer: INPRS's email size limit is 25MB. Multiple emails may be submitted if necessary.

3. (Section 1.8) What is the expected date by which INPRS will issue answers to submitted clarification questions?

Answer: July 25, 2025.

4. To align the training materials accurately, may digital copies or high-level summaries of the Prosci-based artifacts (personas, journey maps, KPI dashboards) referenced in Section 3.2 be provided?

Answer: These would be provided to the selected vendor.

5. Section 3.2 refers to Prosci-based change-management assets. Could INPRS supply detailed descriptions or samples of those assets?

Answer: These would be provided to the selected vendor.

6. Section 3.3 calls for training both internal staff and external employers. Could INPRS provide the estimated number of internal staff by department or role?

Answer: Employer Engagement and Employer Advocates – 16.

7. (Section 3.3) Could INPRS supply the estimated number of external employer-users, broken out by industry or organization size?

Answer: Page 201 of INPRS's most recent Annual Comprehensive Financial Report (<http://www.in.gov/inprs/annualreports.htm>) best displays this information.

8. (Section 3.3) Could INPRS specify any expected class-size limits or maximum concurrent session counts?

Answer: No limit.

9. Section 3.3 lists instructor-led workshops, e-learning modules, and job aids. Could INPRS indicate any preferred split between in-person and virtual delivery?

Answer: To be determined by utilizing selected vendor expertise and recommendations.

10. (Section 3.3) Are there mandated platforms (e.g., Zoom, WebEx, a specific LMS) that INPRS requires for virtual or e-learning sessions?

Answer: MS Teams.

11. (Section 3.3) Does INPRS maintain a preferred Learning Management System (LMS) or content-hosting platform for e-learning modules?

Answer: INPRS utilizes SuccessFactors for staff web-based training. There is not a preferred LMS for e-learning modules for our employers.

12. (Section 3.3) If an LMS is preferred, could INPRS share technical specifications or sandbox access details?

Answer: Specifications would be provided to the selected vendor.

13. (Section 3.4) Section 3.4 describes ongoing payroll-reporting via legacy systems. Are integration guides or API documentation available to inform training content on data flow?

Answer: These would be provided to the selected vendor.

14. (Section 3.4) Will INPRS provide a Salesforce sandbox or training environment for content development and pilot sessions?

Answer: These would be provided to the selected vendor.

15. (Section 3.4) If a sandbox environment is provided, what level of access and which data elements will be available?

Answer: To be determined and defined during the Discovery and Design phases of the project.

16. Section 3.5 requires progress reports. Could INPRS specify the desired reporting cadence (e.g., weekly, bi-weekly, monthly)??

Answer: Weekly.

17. (Sections 3.5 & 3.6) Could INPRS supply a sample or template for regular status updates and KPI dashboards?

Answer: Discretion is left to the vendor on status update format.

18. Section 3.6 mentions metrics assessment and training-completion tracking. Could INPRS define specific success targets (e.g., 90 % completion, minimum assessment scores)?

Answer: To be determined in collaboration with INPRS Business Sponsor and the selected vendor.

19. Section 3.7 calls for a post-implementation review and lessons-learned. Does INPRS have an existing template or framework for that deliverable?

Answer: Discretion is left to the vendor on format.

20. (Sections 2.4 & 3.5) What formal change-control process will govern adjustments to scope, content, or schedule once contract execution begins?

Answer: INPRS has a formal change control process that includes review and approval by the Project Sponsor and Executive Team members.

21. Section 2.3.5 allows contract-exception requests. What is INPRS's process and timeline for reviewing and negotiating those exceptions?

Answer: Respondents must submit their contract exception requests with their response as described in Section 2.3.5. INPRS will evaluate the requested changes as part of the proposal evaluation process. INPRS may contact respondents for clarification as INPRS selects finalists and makes the decision on contract award.

22. Appendix C requests references for similar engagements. Will INPRS accept commercial (private-sector) references in addition to public-sector clients?

Answer: Yes.

23. Are there any industry or project-scope preferences for the references requested in Appendix C?

Answer: Similar in size and nature to INPRS.

24. Section 2.3.3 mandates submission of financials for the last two fiscal years. Should those financials be marked confidential under APRA?

Answer: Under APRA, financial information that is not publicly available is exempt from disclosure. INPRS will not disclose this information in response to an APRA request.

25. (Section 2.3.3) Is a redacted public-release version of the financial statements acceptable?

Answer: It is not necessary for respondents to redact financial statements that are not publicly available since they are exempt from disclosure under APRA. However, the RFP evaluation team will review the unredacted financial statements during the proposal evaluation process.

26. Section 2.4 requires fixed fees for the initial two-year term. Will escalation clauses be permitted for renewal years beyond the initial term?

Answer: If INPRS decides to renew after the initial two-year term, renewal fees will be negotiated prior to renewal.

27. Section 2.3.3 describes personnel qualifications. Are subcontractor resumes required at the same level of detail as prime personnel?

Answer: Yes.

28. (Section 2.3.3) Are background checks or security clearances mandated for key personnel or subcontractors?

Answer: Yes.

29. (Section 4.4) What evaluation criteria will be applied during finalist presentations?

Answer: Evaluation criteria are listed in Section 4.2 of the RFP.

30. (Section 4.4) Will finalist presentations be held virtually or on-site?

Answer: Preferably, on-site.

31. (Section 4.4) What evaluation criteria will be applied during finalist presentations?

Answer: Evaluation criteria are listed in Section 4.2 of the RFP.

32. Section 4.2 outlines up to eight one-year renewals. Will renewal decisions be based solely on performance against KPIs?

Answer: Each renewal term may be up to two years. Renewal decisions will be made based on INPRS's business needs and the incumbent vendor's performance.

33. (Section 4.2) Will pricing and scope be eligible for renegotiation at each renewal period?

Answer: Yes.

34. Could INPRS please confirm the name of the vendor that implemented the new Salesforce system?

Answer: KPMG.

35. Regarding training services, could INPRS clarify whether the vendor who implemented Salesforce is unable to provide training, or if they are not eligible to do so?

Answer: They are able and eligible to do so.

36. Could INPRS share the estimated or allocated budget for this project?

Answer: Not at this time.

37. Is INPRS open to the vendor providing training remotely or offshore?

Answer: Offshore labor is not permitted for this RFP. Delivery methods for INPRS staff and employers will be tailored based on the finalized training plan and content.

38. How many end users are expected to be trained under this program?

Answer: The total number of end users expected to be trained under this program is yet to be determined. It will be defined as employer groups are identified and the training program is developed.

39. Could INPRS provide a copy of the cost proposal Excel sheet, as the link provided in the RFP document appears to be non-functional?

Answer: You should be able to open Appendix F – Fee Proposal from the Word version of the RFP which is provided at <https://www.in.gov/inprs/procurement/quoting-opportunities/> . If you continue to have problems, please contact procurements@inprs.in.gov.

40. Can you provide details of existing Salesforce licenses that will be implemented?

- a) Cloud(s) – e.g., Sales, Service, Marketing, etc.
- b) Edition – e.g., EE, UE
- c) Estimated Users – internal and external
- d) Are any INPRS users currently using Salesforce?

Answer: This will be provided to the selected vendor.

41. Will you be implementing SSO and MFA?

Answer: Yes.

42. Will you be integrating Salesforce with Outlook or Gmail?

Answer: Outlook.

43. Will you be integrating Salesforce with any external systems, and, if so, please provide details?

Answer: This will be a “landing portal” that integrates with INPRS core employer payroll reporting system, Employer Reporting and Maintenance (ERM).

44. Can you clarify and confirm each specific User Group that you want to be trained – i.e., internal and external – and what the training focus should be for each group?

- a. How many different User Roles will be trained, and will you require a separate Curriculum for *each* Role or will you need a single ‘internal’ curriculum to be used for training all Roles?

Answer: Internal INPRS staff and external Employers will be trained. User roles to be determined during the system design and Training Plan development phases.

45. What Salesforce Objects will be visible to internal Users?

- a) Can you list the Business Processes that internal Users will be responsible for – e.g., Lead Management, Account Management, Contact Management, Employer Management, etc.?
- b) How are you currently managing these processes?
- c) Will training for Mobile use be required?

Answer: This will be provided to the selected vendor.

46. Can INPRS clarify the expected number and formats of training deliverables (e.g., what kind of manuals, job aids, e-learning modules, or videos are needed/anticipated?)

Answer: The expected number of training formats and deliverables will be determined during the system design and Training Plan development phases.

47. Is there any reason that your current implementation partner is not providing this training?

- a) RE: “Collaborate with established Employer Council and Change Champion Network to support organization change by reinforcing the desire future state, addressing questions and concerns, promoting engagement and fostering alignment across key business initiatives.”, when and why would you expect your training vendor to engage?
- b) Is your partner responsible for delivering specific information RE: the solution design, Flows, etc.?

Answer: The implementation partner is eligible to complete the training.

48. Does INPRS have an LMS (Learning Management System) that needs to be utilized for training?

Answer: See Question 11.

49. If an LMS is not in use, what is the preferred method for distributing and tracking training content for INPRS users?

Answer: See Question 11.

50. Can INPRS confirm whether an internal LMS or content hosting platform (e.g., SharePoint, intranet, external portal) must be used for training delivery, or if the vendor should recommend one?

Answer: See Question 11

51. Will the implementation partner be providing finalized process flows or user journeys to support alignment of training content?

Answer: Yes.

52. Will the training vendor be given access to a Salesforce sandbox or UAT environment during the development of training materials? If so, will the vendor have access to early demos or walkthroughs of the Salesforce solution and Experience Cloud portal to validate training content against the live system?

Answer: Yes.

53. To support long-term adoption and reinforcement across employer personas, does INPRS prefer that training content include interactive elements in addition to static documentation, and are there any accessibility or platform constraints we should consider?

Answer: Interactive training elements and static documentation are preferred. Accessibility and platform requirements will be confirmed with the selected vendor.

54. Is the July 2026 go-live date for the Employer CRM Portal considered fixed, or should the training vendor plan for the possibility of timeline shifts?

a) Can you share when all functionality/screens, etc. will be 'frozen' thereby allowing the creation of all curricula?

Answer: The new Employer CRM Portal is targeted for a go-live in July 2026; however, INPRS wants to maintain flexibility with our implementation and training partner to ensure all INPRS employers are effectively ready for this change and can adjust the final go-live date as needed to ensure a successful implementation.

55. Should the training vendor propose a content development approach that includes iteration cycles or contingency plans in alignment with INPRS's change management milestones (provided these change management milestones are defined)?

Answer: Training should be planned and developed in an iterative fashion. This approach provides greater flexibility and responsiveness.

56. Can INPRS confirm whether the vendor's involvement is expected to continue beyond the Post-Implementation Review, or if the scope concludes upon delivery of training materials, knowledge transfer, and reinforcement documentation?

Answer: The scope for this RFP would not continue past delivery of materials and post-implementation review.

57. INPRS staff will deliver the training, and the vendor is expected to support delivery-- should deliverables from the vendor include trainer-facing materials like facilitation guides or speaker notes in addition to learner content?

Answer: Yes.

58. Will INPRS assign a central point of contact to help coordinate across the OCM team, Communications team, and implementation partner during training development? Will a project manager be assigned from the INPRS or Implementation team?

Answer: Yes, there will be a dedicated project manager from both INPRS as well as the system implementation partner.

59. Will the vendor be expected to directly participate in sessions with external stakeholders such as the Employer Council or Change Champions, or will input from those groups be provided through INPRS?

Answer: The vendor should choose the best way to evaluate training needs and make sure the materials are developed with the right level of context.

60. Can INPRS share how training effectiveness will be measured, and whether any specific KPIs, survey tools, or evaluation frameworks are already in place?

Answer: INPRS is currently using evaluation frameworks and effectiveness measures for training initiatives. The vendor will work collaboratively with INPRS to determine how best to measure training effectiveness and select the appropriate tools and KPIs for this engagement.

61. Will the vendor have access to existing OCM specific deliverables such as stakeholder maps, journey maps, KPIs, and communication plans?

Answer: Yes.

62. Will INPRS require editable source files for all training deliverables as part of final handoff?

Answer: Yes.

63. Will training content need to be version-controlled across multiple releases if portal enhancements are planned after initial go-live?

Answer: Yes.

64. Will the vendor be expected to support any live training delivery dry runs, train-the-trainer rehearsals, or script reviews with INPRS staff?

Answer: Yes.

65. Can all Services be provided remotely?

Answer: While some services may be delivered remotely, it is expected that the vendor will collaborate closely with INPRS and incorporate a reasonable level of in-person engagement.

66. Can we use Certified ‘off-shore’ (employee) Consultants as part of our Project Team to assist in the development of training materials?

Answer: See Question 37.

67. Do you have any budget information you can provide at this time?

Answer: We are not able to share at this time.

68. Appendix D – Technical Response, page 37. Should the answers to APPENDIX D – TECHNICAL RESPONSE be included in the Business Proposal or live as its own document?

Answer: Including within the Business Proposal or as a separate document are both acceptable.

69. 3.2.1 Deliverables, page 12. Can you provide more details around the scope of the communication materials? Is it INPRS intention for the vendor to help shape and have input to the materials that INPRS Communications team develops or do you intend for the vendor to create/develop the communication materials?

Answer: The INPRS Communications team will develop communication materials with input from the vendor.

70. Section 3 Background Information, page 10. Will INPRS be leveraging the knowledge base within Salesforce Knowledge?

Answer: To be determined during Discovery and Design.

71. 4.1 Length of Contract, page 13, and Appendix F. Can you clarify how many years of cost you expect to be completed in Appendix F (Appendix F shows 5 years of cost, however section 4.1 shows the length of the contract period is 2 years with possible renewals)?

Answer: The Appendix F Excel spreadsheet has been revised to reflect a two-year contract period. Please refer to the revised RFP documents at <https://www.in.gov/inprs/procurement/quoting-opportunities/>.

72. 3.2 CRM/Workflow Implementation, page 12. As part of the preparation for training delivery, can you provide INPRS expectations of the training vendor in regards to your training staff’s preparation? Do you anticipate the vendor doing train-the-trainer preparation sessions with INPRS trainers or attending the live staff trainings INPRS will facilitate?

Answer: INPRS expects the vendor to engage in collaborative training development and facilitate knowledge transfer to INPRS training staff, which may include train-the-trainer sessions and participation in live trainings.

73. 3.2 CRM/Workflow Implementation, page 12. How many trainers does INPRS have that will facilitate training delivery?

Answer: Approximately 6 individuals will collaborate with the vendor to facilitate training delivery.

74. 3.2 CRM/Workflow Implementation, page 12. For in-person and on-site sessions, do you have an estimate of the number of sessions that you would like for the training vendor to support?

Answer: The number of in-person and on-site sessions the training vendor will support will be determined as the training plan is developed and finalized.

75. Section 3 Background Information, page 10. How many different user groups will need training, and within those groups, how many different roles will be trained? If possible, please provide a list of the different groups and roles.

Answer: See Question 44.

76. 3.2.1 Deliverables, page 12. Can you provide more details around the scope of the Collaborate with Existing Groups deliverable? Are there development deliverables outside of the resistance management plan that the vendor will contribute to within this deliverable?

Answer: The vendor will work closely with existing groups to support change as these groups offer valuable insights. The vendor is expected to be a true partner; development, communications, and training efforts should be closely connected and not done separately.

77. 3.2.1 Deliverables, page 12. Can you provide any details about the amount of training materials you assume will be needed based on your user roles? Are there any requirements that we should be aware of (SCORM, 508, etc.)?

Answer: See Question 46.

78. Appendix F, Fee Proposal. If INPRS has preferences for the quantities listed for the training costs (# of job aids, manuals, modules, etc.), can you please provide?

Answer: No preference.

79. Appendix F, Fee Proposal. Some fields in Appendix F are not covered by this RFP (System Costs, License Costs, etc.). Should vendors assume that all costs for this RFP should be funneled into the Training Costs Detail and possibly the Recurring Cost Detail (for updates to deliverables after go-live) sections only?

Answer: The Appendix F Excel spreadsheet has been revised. Please refer to the revised RFP documents at <https://www.in.gov/inprs/procurement/quoting-opportunities/>.

80. Appendix F, Fee Proposal. Will the State publish a target budget or ceiling to guide cost proposals? If so, please provide.

Answer: No.

81. 4.2 Evaluation Criteria, page 13. Will you apply weights to the evaluation criteria? If so, please provide.

Answer: The scoring rubric is currently being developed.

82. Section 3, Scope of Services, Background Information, page 11. Can you provide more details on the timeline, especially regarding the end date of the project, testing, and any milestones that may cause potential delays to go-live?

Answer: See Question 54.

83. Appendix D, page 37. In reference to this Assessment and Planning question: “How do you plan to assess the current state of our organization in terms of readiness and maturity for change before training implementation?” - Can you please clarify who INPRS envisions owns the responsibilities to complete the readiness assessment (INPRS OCM staff, vendor staff, etc.)? Should we assume this is a deliverable for the training vendor?

Answer: The vendor should complete the readiness assessment to determine training needs and content.

84. Appendix F, Fee Proposal. What is INPRS preferred format for any additional options the vendor may want to propose? Where would you like to see any verbiage around additional offerings and the cost associated with those options listed in Appendix F?

Answer: You can describe additional proposed options/offerings in a separate document and add the costs to the Appendix F – Fee Proposal Excel spreadsheet as appropriate.

85. Could INPRS provide more detail on the scope of communication and change management services it is looking for the vendor to provide. For example, as part of collaboration with INPRS' OCM team, will the selected vendor be required to develop and distribute targeted communications or advise INPRS on these activities?

Answer: See Question 69.

86. What is the number of users that need training?

Answer: See Question 38.

87. Which Salesforce Clouds are currently in scope for this implementation?

Answer: See Question 40.

88. What is the preferred training format: in-person, virtual, or a hybrid approach?

Answer: See Question 46.

89. Are there specific locations or departments where training should be delivered?

Answer: Training locations and departments will be defined as the training plan is developed.

90. Do we need to provide training materials? If yes, what is preferred?

Answer: Yes. See Questions 46.

91. Would you like a Learning Management System (LMS) to augment the training process?

Answer: See Question 11.

92. Has the platform been rolled out to any users, or will this be a first-time launch?

Answer: See Question 11.

93. As this is a two-year engagement, could you share the desired outcomes for the first 30 days, 90 days, and 1 year?

Answer: INPRS expects the vendor to propose outcomes for the first 30 days, 90 days, and 1 year as part of the business proposal. Minimum expectations include: establishing a positive working relationship with INPRS stakeholders and the system implementor within the first 30 days; finalizing the training plan within the first 90 days; and delivering the training plan deliverables as scheduled within the first year.

94. May we have access to the personas and journey maps? Please elaborate as to the personas that will require training.

Answer: These would be provided to the selected vendor.

95. How are communication and decision-making currently managed between INPRS, the Salesforce implementation partner, and the internal OCM team? Are there existing meetings, documentation processes, or coordination protocols our team should align with?

Answer: There is an existing program management team and governance structure where communication and decision-making are currently managed. The selected vendor would be included in all appropriate meetings and provided necessary materials for successful engagement and delivery.

96. Section 3.2.1 of RFP states the vendor will "assist in developing a resistance management plan," while Section 3.1 notes a plan already exists. Could you clarify the vendor's role? Is the expectation to enhance the existing plan with insights gained during training development, or to co-develop a new plan with the OCM team?

Answer: See Question 76.

97. Since INPRS staff will deliver the training, what specific materials, workshops, and support channels do you expect the vendor to provide to ensure your training staff are confident and proficient experts on the new system?

Answer: See Question 72.

98. Success Metrics & KPIs: Section 3.1 mentions that KPI and Metric Identification has been completed. Could you share the specific KPIs that will be used to measure the success of the training program and overall user adoption post-implementation?

Answer: See Question 60.

99. For deliverables such as e-learning modules and training manuals, does INPRS have preferred authoring tools, platforms (e.g., a specific LMS), or technical standards that the vendor must adhere to?

Answer: See Question 11.

100. For the Post-Implementation Review (PIR), what specific inputs and success criteria will be used to evaluate the effectiveness of the training deliverables and strategy? Is there a predefined template or framework for this review?

Answer: To be determined in collaboration with the INPRS Business Sponsor and the selected vendor.

101. To create accurate, hands-on training materials, when do you anticipate a stable, configured Salesforce sandbox environment reflecting the Employer Portal's core functionality will be available for vendor access?

Answer: See Question 15.

102. What is the process for providing the training vendor with sample data that reflects the various employer personas and complex use cases you need to support?

Answer: See Question 38

103. Is the \$125 registration fee for the Foreign Registration Statement due at the time of proposal submission, or only upon contract award?

Answer: Registration with the Indiana Secretary of State is not required to submit a proposal but must be completed prior to contract negotiations.

104. Pricing Template: The pricing template included in the RFP documents references a different RFP number, 23-07. Could you please confirm if this is the correct pricing template for RFP 25-05? I want to ensure we are following the right guidelines?

Answer: The Appendix F Excel spreadsheet has been revised. Please refer to the revised RFP documents at <https://www.in.gov/inprs/procurement/quoting-opportunities/>.

105. E-learning Platforms: Could you also clarify if there are specific e-learning platforms through which INPRS plans to disseminate business user training? We want to tailor our solutions to best fit your needs and any existing infrastructure you may be using?

Answer: See Question 11.

106. What is the level of detail/ depth outlined in the personas and journeys INPRS has developed? Would INPRS be willing to share a scrubbed version of an example template for user personas?

Answer: This will be provided to the selected vendor.

107. What are the personas INPRS has identified for the recipients of the training?

Answer: This will be provided to the selected vendor.

108. What can INPRS share about the training audience? E.g., Familiarity with Salesforce? Comfort level with technology? Learning preferences and styles?

Answer: See Question 38.

109. What is the estimated total number of people who will receive training? Can you break that figure down into the estimated number in each type of persona?

Answer: See Question 38.

110. Is there a preferred format for the training sessions (e.g., in-person, virtual, hybrid)?

Answer: See Question 9.

111. What tools (if any) does INPRS currently use for learning management and training participation tracking?

Answer: See Question 11.

112. What tools (if any) does INPRS use for training material content development?

Answer: See Question 11.

113. Are you using WalkMe or other solutions that allow for additional customization and user guidance within Salesforce to support onboarding and measure adoption?

Answer: No.

114. What is driving the October 2026 start date?

Answer: INPRS began a multi-year modernization initiative in 2023 to improve the experience for its Members, Employers and Business Users. We will be wrapping up “Phase 1” of our CRM implementation in late September, and will be ready to kick-off “Phase 2” in October.

115. Can you provide a high-level timeline of key implementation milestones to align the training calendar

Answer: This will be provided to the selected vendor.

116. What expectations have been shared with the Change Champion Team? Is this team available/expecting to support training activities?

Answer: The INPRS Change Champion Team has supported “Phase 1” of our CRM implementation by providing insight respective to their business areas, assisting with review or training materials, as well as being an advocate for change. The same expectations will transfer to “Phase 2”.

117. Does INPRS have a desired cost range in mind?

Answer: No.

118. Our firm is currently registered as a foreign for-profit corporation with the State of Indiana. Are we required to complete the foreign registration statement and pay the associated fee?

Answer: Since your firm is currently registered, there is no need file again.

119. What is the current progress or milestone status of the Employer Portal implementation?

Answer: Project kick-off is scheduled for October, 2025.

120. How many internal INPRS staff members are expected to be trained through this initiative (e.g., Employer Advocates, Trainers)?

Answer: See Question 6.

121. How many employer organizations and user roles (e.g., HR managers, payroll clerks) are expected to use the Employer Portal and participate in training?

Answer: See Question 38.

122. Are you expecting the selected vendor to **only develop** training materials, or also **deliver** live/virtual training sessions?

Answer: INPRS Training, Employer Advocate, and Communications staff will deliver any in-person, on-site, or off-site training and act as the “face of INPRS” for Phase 2 training purposes. INPRS objective is for the training partner to develop training materials, training guides, collaborate with the implementation partner and INPRS, and act as a training expert to help guide INPRS delivery of effective training.

123. What types of training assets are preferred (e.g., eLearning, PDF guides, video tutorials, interactive webinars)?

Answer: To be determined by utilizing the selected vendor expertise and recommendations.

124. Are you expecting any on-site support or direct employer engagement after go-live?

Answer: To be determined by utilizing the selected vendor expertise and recommendations.

125. What duration of post-go-live support or adoption monitoring is expected from the vendor?

Answer: To be determined by utilizing the selected vendor expertise and recommendations.

126. While the targeted go-live is July 2026, would INPRS consider a 12-month engagement (ending Sept 2026) to ensure adequate buffer for training rollout and post-implementation review?

Answer: See Question 54.

127. **Section 2 – Proposal Content Requirements, Page 7:** Can INPRS please confirm whether there is a page limit for the Business Proposal section or the total proposal submission package? Additionally, are there any formatting requirements regarding font type, font size, margins, or limitations for tables and charts?

Answer: There is no page limit and there are no formatting requirements.

128. **Place of Performance Clarification:** Can INPRS confirm the expected place of performance for this engagement?

Specifically, should respondents plan to perform training activities:

- (a) in-person/on-site,
- (b) virtually/off-site, or
- (c) through a hybrid delivery model?

Answer: See Question 65.

129. **Section 2.4 – Fee Proposal, Page 10:** Is there a target budget or Fee Not-to-Exceed amount for the Base Year that INPRS would like respondents to consider when developing a scope and cost proposal?

Answer: No.

130. **Sections 3.1 and 3.2.1 – Tools and Platforms:** In addition to the Prosci Proxima tools cited in the RFP, are there any other collaboration or training development tools that the selected Training Vendor will be required or strongly encouraged to use?

Answer: No

131. **Section 3.1 – Lessons Learned:** Have any lessons learned been documented from previous INPRS change management or training initiatives that can be shared to inform the Training Vendor's approach?

Answer: To be provided to the selected vendor.

132. **Section 3.1 – System Access:** To effectively coordinate with the Salesforce implementation team, can you confirm whether the Training Vendor will be granted access to any of the following environments: User Acceptance Testing (UAT), Pre-Production, or Production?

Answer: UAT.

133. **Section 3 – Scope of Services:** Can INPRS provide a breakdown of the various user groups or roles that will require tailored training (e.g., Employer Advocates, Payroll Staff, Administrators)?

Answer: See Question 38.

134. **Section 3 – Scope of Services:** Can you confirm the estimated total number of end users that will need to be trained as part of this engagement?

Answer: See Question 38.

135. **Section 4.2 – Evaluation Criteria, Page 13:** Can INPRS clarify whether the nine evaluation criteria listed will be equally weighted? If not, could you provide the approximate weighting or scoring percentages for the Business Proposal and Fee Proposal components?

Answer: See Question 81.

136. **Appendix C – Questionnaire, Page 34:** If relevant past performance examples are primarily through subcontractor roles rather than prime contracts, will INPRS accept subcontractor experience so long as the work is analogous to the requirements of this RFP?

Answer: Yes.

137. **Appendix C – Project Team Matrix, Page 36:** Is there a maximum number of full-time equivalents (FTEs) or resources that INPRS expects or prefers not to exceed for the duration of the contract?

Answer: No.

138. **Appendix C – Project Team Matrix, Page 36:** Can proposed personnel be assigned to multiple roles (e.g., a Project Manager also serving as a Trainer), with the understanding that individuals will only bill under one role at a time?

Answer: Yes.

139. **Appendix G – Process Catalog, Page 42:** Appendix G references four supporting files: one Excel-based Process Catalog and three embedded PDF diagrams. We were able to access the Excel spreadsheet, but we are unable to open the three embedded diagrams. Can you please provide access to the missing files or reissue them separately?

Answer: You should be able to open the three embedded diagrams from the Word version of the RFP which is provided at <https://www.in.gov/inprs/procurement/quoting-opportunities/> . If you continue to have problems, please contact procurements@inprs.in.gov .

140. **Acquisition Strategy:** Can you please confirm whether this procurement is an unrestricted/open competition or if it is a small business set-aside (e.g., Woman-Owned, Veteran-Owned, HUBZone)??

Answer: The procurement is unrestricted/open competition.

141. Can you clarify the expected number of employer end-users that will require training, and whether all employers will receive training directly from INPRS or through self-service/eLearning formats?

Answer: See Question 38.

142. Are there preferred delivery formats for training materials (e.g., SCORM-compliant eLearning, instructor-led webinars, printable manuals), or is the vendor expected to recommend the mix?

Answer: Discretion is left to the vendor.

143. Could you share detailed role personas or use cases that should be addressed through role-based training (e.g., payroll admins, benefit coordinators, IT liaisons)?

Answer: See Question 38.

144. Will the training vendor be given access to a sandbox or test environment of the Salesforce Employer Experience Portal during development of training materials?

Answer: Yes.

145. How will collaboration be structured among INPRS internal teams (OCM, Training, Communications), the implementation vendor, and the awarded training vendor? Is there a defined governance or review cadence?

Answer: See Question 95.

146. Does INPRS already have any existing training materials, guides, or knowledge articles related to Salesforce CRM or the Employer Portal that the vendor should incorporate or revise?

Answer: This information would be provided to the selected vendor.

147. Will training materials need to meet specific accessibility standards (e.g., WCAG 2.1) or be translated into other languages for diverse employer audiences?

Answer: Yes, accessibility requirements will be confirmed with the selected vendor.

148. What key performance indicators (KPIs) or outcomes will be used to evaluate the success of the training initiative?

Answer: See Question 60

149. To what extent will the vendor be involved in resistance management activities versus simply aligning training content to pre-defined plans?

Answer: See Question 76.

150. Is July 2026 still a firm go-live target for the Employer Portal, or is there a risk the training development/delivery timeline could shift?

Answer: See Question 54.

151. Are there expectations for the vendor to provide post-go-live training support (e.g., office hours, refresher webinars, help desk support)?

Answer: To be determined.

152. Will INPRS expect the vendor to participate in live training delivery, or is the vendor strictly responsible for materials and guidance?

Answer: See Question 57.

153. What is the budget allocated for this project?

Answer: This information cannot be provided.

154. Who is the current incumbent for this project?

Answer: This information would be provided to the selected vendor.

155. Will vendor personnel need background checks for any system or onsite access?

Answer: Yes.

156. What channels (email, SMS, portal popups) will be used for employer outreach?

Answer: All of the above.

157. What KPIs will be used to measure training effectiveness (completion, feedback, support tickets)?

Answer: See Question 60.

158. Does INPRS plan to use my Trailhead or in-app training tools?

Answer: Training content to be determined during Training Plan development.

159. What is the anticipated budget or funding range allocated for this training engagement?

Answer: This information cannot be provided.

160. Have there been any previous training engagements or vendor-led CRM rollouts with INPRS? If so, what were the key lessons learned or challenges encountered?

Answer: This information would be provided to the selected vendor.

161. Is there an incumbent vendor currently providing Salesforce training or CRM services for INPRS? If yes, how much was their contract valued at?

Answer: An incumbent vendor is currently providing Salesforce for training for INPRS.

162. What specific challenges or gaps in previous solutions (if any) is INPRS looking to overcome with this new Employer Portal training initiative?

Answer: This information would be discussed and determined as part of the Discovery and Design phases of the project.

163. What level of access will the training vendor receive to the Employer CRM Portal (e.g., sandbox, staging, mock data) to design realistic and contextual materials?

Answer: Appropriate access would be provided to the selected vendor.

164. Does INPRS expect the vendor to train employers directly, or only provide materials and support for INPRS staff to deliver training (i.e., train-the-trainer model)?

Answer: See Question 57.

165. Is INPRS expecting the training content to comply with specific technical standards (e.g., SCORM, WCAG accessibility, Learning Management System compatibility)?

Answer: Yes.

166. What is the anticipated volume and diversity of training audiences (e.g., number of employers, user personas, and regional clusters)?

Answer: See Question 38.

167. Will the Salesforce implementation partner be identified and onboarded before training collaboration begins?

Answer: KPMG is the selected Salesforce implementation partner and would be onboarded before training collaboration begins.

168. Can you clarify the role and structure of the Change Champion Network and how the training vendor is expected to interface with it?

Answer: See Question 76.

169. Do you have a defined method for tracking training success (e.g., KPIs, dashboards, learner satisfaction)? Or is the vendor expected to propose this measurement framework?

Answer: See Question 60.

170. Will the vendor be expected to support reinforcement, onboarding, and retraining activities post-go-live (July 2026), and should these be priced separately?

Answer: See Question 56.

171. Are travel costs allowed or expected? If so, should these be included under “Other Costs” or proposed separately as reimbursable?

Answer: INPRS will only pay for actual travel costs and respondents must provide receipts for reimbursement. Please include estimated travel costs in Appendix F – Fee Proposal.

172. Are Key Personnel allowed to work remotely?

Answer: See Question 65.

173. Is the Project Manager billable or non-billable?

Answer: It is the vendor’s decision whether the vendor bills for vendor project manager costs.

174. What is the level of effort (Number of Key personnel required & roles)?

Answer: See Question 137.

175. Is there any software that the state prefers?

Answer: See Question 11.

176. Are incumbents allowed to re-bid?

Answer: Yes.

177. What are your top 3 pain points or inefficiencies you hope the CRM will resolve in your current processes?

Answer: This information would be shared with the selected vendor.