Proposed Sole Source Purchase Form

Pursuant to New Mexico Procurement law, the UNM Purchasing Department will post your completed form on the UNM Sunshine Portal for 30 days prior to purchase of the goods/services.

I. GENERAL INFORMATION. PLEASE PROVIDE THE FOLLOWING:

<table>
<thead>
<tr>
<th>Date of Request</th>
<th>22 June, 2019</th>
<th>Requisition Number (If Applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Submitted by</td>
<td>Lynn Wain</td>
<td>Title</td>
</tr>
<tr>
<td>Department</td>
<td>Project ECHO</td>
<td>Email</td>
</tr>
<tr>
<td>Proposed Vendor</td>
<td>Salesforce</td>
<td>Amount</td>
</tr>
<tr>
<td>Buyer Team - See Commodity list at <a href="http://purchase.unm.edu/staff--commodities.html">http://purchase.unm.edu/staff--commodities.html</a></td>
<td></td>
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</table>

**Provide a basic description of goods/services to be provided:**

Salesforce customer relationship management (CRM) system for use by Project ECHO for managing and engaging with the network of global partners and participants

**Why is this purchase needed?**

Project ECHO’s work is growing exponentially; in the last year alone, its global network of participants has grown from around 40,000 persons to over 70,000 persons. Project ECHO currently utilizes a system built in-house to manage this network and their activity, however has outgrown its capabilities and Project ECHO lacks the capacity to redesign it to meet them. As the network’s speed of growth increases and as needs evolve, Project ECHO needs a sophisticated and highly configurable tool for managing, tracking, understanding, and stewarding the network which can empower its continued growth. Salesforce has a proven track record in the public and private sectors for managing these types of needs at a global scale, and is the only product that can meet Project ECHO’s needs.

II. BASIS FOR SOLE SOURCE PROCUREMENT. CHOOSE APPLICABLE BOX(ES) AND PROVIDE ADDITIONAL INFORMATION, AS REQUESTED:

☑ Proprietary item, technology or service only available from the proposed vendor. (Check box and describe proprietary component)

Salesforce CRM is economically only available from Salesforce itself since they are the sole developer and provider. In addition to its CRM functionality, Salesforce also:

- Provides access to an ecosystem of over 3000 3rd party applications called AppExchange.
- Supports Project ECHO developing new applications as required by the ECHO Movement.
- Has a training module that ECHO can upload custom training materials to and track progress.
- Has a file repository that support uploading ECHO's files and enables tracking views, etc.
- Provides the ability to extend the contract to include future years with a specified maximum price increase.

☑ Compatibility requirement with existing item, technology or service. (Check box and describe compatibility requirement)

Integration of ECHO participant data across Project ECHO’s collection of applications is a mandatory compatibility requirement. Salesforce has existing, quality integrations with all of Project ECHO’s current core tools, including: Zoom for hosting ECHO programs, Box for document sharing, Outlook for individual communications, MailChimp for mass communications, Slack for internal communications, Cvent for event registrations, REDCap Cloud for surveys/research, and Microsoft Power BI for analytics and data analysis. Salesforce will fill the gap of needs that these other tools cannot meet, while utilizing these connections to fit seamlessly alongside existing tools to create a powerful ecosystem.

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### III. SUPPLEMENTAL DETAILS. PLEASE PROVIDE ADDITIONAL INFORMATION AS REQUESTED BELOW:

Describe in detail the unique capabilities of the proposed vendor's goods/service and/or personnel performing the work and why this constitutes the only source. Focus on what is unique about the goods/service and why no other vendor could meet your needs.

For a CRM to truly impact Project ECHO and empower continued exponential growth, we need a seamless tool for managing all aspects of relationships with participants. Additionally, Project ECHO envisions having over 20,000 active users in the system from around the world, making a system that excels at global scale direly important. Salesforce is the only vendor to offer all of the necessary components in one single product suite.

With regard to managing relationships, Salesforce provides a seamless interface for managing all aspects across the ECHO Movement, including:

- The pipeline of converting organizations interested in joining the ECHO Movement to full participants, and all aspects of that process: prospecting, contracts, completion of training, resource provisioning, launching programs, and ongoing technical assistance.
- The scheduling, implementation, and tracking of ECHO programming over time.
- The full picture of a participant’s engagement in ECHO programming, including: contact information, attendance, interactions, cases presented, lectures presented, trainings completed, and changes over time.
- The complex relationships that participants in ECHO have across organizations, programs, and initiatives.
- The complex relationships between programmatic activities and the initiatives (grant and/or strategy) they are related to, so that we can report on and understand that full picture to stakeholders.

With regards to operating at global scale, Salesforce is the leading global CRM tool, and uniquely excels at:

- **Accessibility** – providing an interface that:
- Can seamlessly switch between 18 different languages.
- Easy and intuitive to learn by users.
- Follows the internationally recognized best practices for accessibility in Section 508 of the Rehabilitation Act and the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA.
- Can operate on low- and high-bandwidth, and across all devices.
- Has well documented features, trainings, and how-to’s to empower quality usage.
- Can integrate with other 3rd party applications, and be a platform for programming/developing new applications that further extend the tool to continuously meet needs.

- **Compliance** — as the leading global product, manages data and privacy in accordance with all governmental regulations (e.g. the European Union’s General Data Protection Regulation (GDPR)).

- **Permissions** — allowing for a granular ability to determine the level of data access each user has, and define it based on business logic, to ensure users only see the information they need access to. With the potential of growing to over 20,000 active users, permissioning an incredibly important requirement.

- **Configuration and Automation** — allowing easy ability to modify the interface for improved efficiency and new capabilities, so that the system can evolve over time, empowering users to focus on their work instead of workarounds.

While there are a number of vendors that offer individual components that do each of these functions, the added layers of complexity of using them in tandem or developing integrations across them would greatly impact the ability of Project ECHO to continue to scale. The primary goal of a unified system is to break down silos, and to improve our overall processes. Anything other than a single unified platform would introduce additional silos, complicated bespoke integrations, unnecessary complexity, and increased costs.

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**Describe the due diligence made to locate other possible sources including communications with other universities, communications with similar providers, web searches, yellow page searches, review of advertisements and trade publications, etc.**

Project ECHO began a thorough process to understand its system needs and what products could meet those needs in January 2019. That process yielded 13 potential CRM systems, which upon deeper review culminated in Salesforce being the only tool that could meet Project ECHO’s unique global and evolving needs.

Steps in this process were as follows:

- 10+ discussions with 60+ current and prospective system users to understand their needs and how the current system meets/doesn’t meet those needs.
- Development of 8 user personas to understand the core users and usage areas of the system.
- Synthesis of core requirements in a system based on discussions and personas.
- Creation of an interactive mock-up that users could provide feedback on, to validate that we understood needs correctly.
- Gathering of CRM recommendations from staff, external partners, "best CRM" lists/reviews, and web searches. It lead to a list of 13 systems.
- Reviewed the 13 recommendations against the core requirements. 3 systems stood above the rest in their ability to meet all or most requirements on paper: Salesforce, Hubspot, and SugarCRM.
- Reached out to all three remaining systems for more information, demos, and sandboxes to test them. We were able to receive sandboxes for Salesforce and Hubspot, configured both based on requirements lists, and had a group of ~25 testers test each thoroughly to provide feedback.
- After testing, it became clear that Salesforce’s interface was preferred by users and it could meet all immediate needs, however more importantly it was clear that Salesforce had the ability to scale and evolve with ECHO long-term (specifically with permissions, configurability, accessibility, and compliance), whereas Hubspot had very little ability to be configured and would not actually meet our needs.

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<th>Vendor</th>
<th>Description</th>
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<tbody>
<tr>
<td>List the other vendors who were contacted. Please describe the specs/qualifications/criteria that the other vendors were unable to satisfy.</td>
<td>It wasn't possible to find a single vendor that met all of our needs, other than Salesforce. However, we evaluated the following 12 other vendors during our process. When systems clearly failed to meet one of the core requirement areas—particularly permissions, configurability, accessibility, and compliance—we moved on.</td>
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<tr>
<td>Hubspot:</td>
<td>On paper, Hubspot appeared to meet all core requirements, however upon thorough sandbox testing it was clear that the system's default functionality areas were not able to track all of the types of data we need to track for our workflows, and the system lacks the ability to reconfigure it to do so. Meaning, we'd need supplemental CRM systems or components in addition to Hubspot to meet our needs.</td>
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<td>SugarCRM:</td>
<td>Upon reaching out to SugarCRM for more information, demos, and testing space, it was difficult to gain information or support from their customer service team, and after repeated attempts we made the decision to cease reaching out and instead continue our own research, at which it became clear it could not meet our complex user permissioning needs.</td>
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<tr>
<td>Microsoft Dynamics 365:</td>
<td>During the review process it was difficult to understand how the capabilities that Microsoft Dynamics 365 lined up with Project ECHO's core requirements. Since needing well documented features, trainings, and how-to's to empower quality usage is a core requirement, it became clear the system did not meet that foundational piece and we did not elevate it for further review. Additionally, it became clear the system likely could not scale to the complexity of users ECHO requires.</td>
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<tr>
<td>Oracle CRM:</td>
<td>During the review process, our team found that Oracle CRM was lowly ranked among CRMs, overly complicated to understand, and documentation was lacking. Since needing well documented features, trainings, and how-to's to empower quality usage is a core requirement, it became clear the system did not meet that foundational piece and we did not elevate it for further review.</td>
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<tr>
<td>Zoho CRM:</td>
<td>Zoho CRM met many of our core requirements, however it is a relatively new platform and through review it was clear it currently lacked the configurability ECHO requires and would not be able to scale and grow alongside ECHO.</td>
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<tr>
<td>Cloze:</td>
<td>Cloze lacked the ability to track core data types, including trainings, contracts, and programs and would not meet ECHO's CRM needs.</td>
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<td>Ontraport:</td>
<td>Ontraport is designed for small groups of users (e.g. &lt;5 users per system), not groups in the thousands. It was clear it would not meet our scaling needs based on that alone.</td>
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<tr>
<td>Blackbaud:</td>
<td>During the review process, our team found that Blackbaud was lowly ranked among CRMs, overly complicated to understand, and documentation was simply not available to understand its core features. Since needing well documented features, trainings, and how-to's to empower quality usage is a core requirement, it became clear the system did not meet that foundational piece and we did not elevate it for further review.</td>
</tr>
<tr>
<td>NeonCRM:</td>
<td>NeonCRM only allows 10 users to login at a time, which would make it impossible to use at scale.</td>
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Oro:
During the review process, our team could not find good documentation to answer simple questions about functionality. Since needing well documented features, trainings, and how-to's to empower quality usage is a core requirement, it became clear the system did not meet that foundational piece and we did not elevate it for further review.

Pipedrive:
Pipedrive lacked the ability to track core data types, including trainings, programs, and fundraising and would not meet ECHO's CRM needs.

Zendesk:
Zendesk lacked the ability to track core data types, including trainings, programs, and fundraising and it also lacked a permissioning structure with the granularity ECHO needs.