

REGISTRAR OF CONTRACTORS SALESFORCE INDEPENDENT ORG DEVELOPMENT AND MIGRATION

PIJ RG18001, CR-0366

WHERE WE STARTED

- Between 2010 and 2017, the Arizona Registrar of Contractors (ROC) was on a CAVU system that had limitations with customer interactions, modifications, stability, and support
- The ROC began investigating options to move to a new, more stable system to better serve our customers, streamline staff processes, and protect our data
- The statewide Salesforce eLicense solution was determined to be the best foundational system and we became one of the state entities to join the project

MOVING TO THE STATEWIDE SALESFORCE ELICENSE ORG

- September of 2017, ROC joined the eLicense project
- May of 2018, the “13 Boards” began using the eLicense system
- September of 2018, as planned, due to increased data migration complexities and additional development needed in Salesforce, ROC began using the eLicense system
- March of 2019, the Department of Financial Institutions began using the eLicense system

ROC SALESFORCE ELICENSE PHASES

PHASE I

(SUCCESSFULLY
COMPLETED)

- September 2017 – September 2018
- Initial migration from CAVU system to Salesforce eLicense platform

PHASE II

(SUCCESSFULLY
COMPLETED)

- September 2018 – January 2019
- Improvements and customizations made to eLicense by ROC internal Salesforce Administrator

PHASE III

(IN PROGRESS,
ON TRACK)

- January 2019 – May 2019 (projected)
- Implementation of Egnyte document management system and Intelledox/DocuSign based portal

PHASE IV

(TODAY'S
REQUEST)

- May 2019 – November 2019 (requested)
- Migration to independent Salesforce org

ROC EXPERIENCE ON THE STATEWIDE ORG

ADVANTAGES GAINED

- Cloud hosted solution provided increased stability
- Ability to use Salesforce from anywhere, including from mobile devices
- Ability to customize the Salesforce application
- Migration gave ROC an opportunity to perform data validation and retention cleansing
- Option to implement third party plug-ins into Salesforce

OPPORTUNITIES IDENTIFIED

- More efficient governance process
- Elimination or reduction of latency related to configuration and package installation
- Ability enhance system to meet ROC customer needs
- Enhanced system architecture documentation
- Simplification of object relationships thereby eliminating redundancy and multiplication of staff data entry
- Improved metrics capture capabilities to support Arizona Management System goals

DECISION TO MOVE TO ROC SPECIFIC SALESFORCE ORG

- ROC explored options for modifying the eLicense Salesforce org and governance process
- Many improvements were implemented by ROC staff
 - Plugins for Egnyte document management system, implementation of DocuSign/ Intelledox for enhanced and online customer application submission, new fields and list values in multiple areas, governance processes became more efficient
- The nature of the shared environment limited the ROC's ability to meet our customer needs
- Migrating to an independent Salesforce org will allow the opportunities identified to be achieved to the benefit of our customers and staff

VENDOR PROPOSALS

- ROC sought proposals from 11 vendors with 4 key components:
 - Timelines and costs for duplicating the eLicense org and migrating the ROC
 - Timelines and costs for developing and migrating the ROC to a Salesforce org, similar to the eLicense org, but with improvements and efficiency gains implemented
 - Develop and provide system documentation for the new Salesforce org
 - Provide options for ongoing vendor support
- Proposals were received from Accenture, IBM, MST, Salesforce, and Deloitte

VENDOR AND SOLUTION SELECTED

- Upon review of all proposals, MST was selected as the best value vendor
- The ROC sought reviews and feedback from other State entities who had used MST services and found positive experiences
- MST's proposal that included implementing improvements and efficiency gains was selected
- The timeline for the project scope from kickoff to go-live is projected at 27 weeks
- The cost for this project is quoted at \$698,560 (fixed cost contract)

ROC FUNDING

- ROC is a 90/10 agency
- Lump sum budget
- The cost of this project is within this year's budget

BENEFITS GAINED WITH THIS PROPOSAL

- MST response addressed all key components requested
- MST is local to the Phoenix Metro area
 - No travel costs
 - Ease of accessibility
- Proposed development includes replacing BasicGov functionality with a combination of Salesforce and Drawloop functionality
 - BasicGov costs are projected to be approximately \$96,400 for the next year
 - Drawloop costs are projected to be \$41,400 annually
 - This will be an ongoing operational cost savings of approximately \$55,000 for the ROC

BENEFITS GAINED BY IMPLEMENTING THIS CHANGE REQUEST

- By moving to our own Salesforce org, the ROC will expedite alignment with Governor Ducey's initiatives
- Strengthen the back-end Salesforce system while still being able to support any front-end/customer facing websites or systems
- Efficiency gains through vendor implementation will reduce latency
- Enhanced architecture documentation to better support our customers

THANK YOU FOR YOUR TIME

QUESTIONS?

