Oakland County
Department of Information Technology
Project Scope and Approach

Project Name: Economic Development Salesforce Enhancements (2023-24)   Project ID: D13191SF

Leadership Group: Finance/Admin			
Department: Economic Development		**Division: All**	
Project Sponsor: Laura Dodd	**Date Requested: 2/15/22**		**PM Customer No. 191**
Request Type: *New Development x* *Enhancement* *Customer Support* *Planned System Maintenance or Upgrade*			
IT Team Name: Infrastructure and GIS		**IT Team No: 1**	
Project Manager/Leader: Susan Moore			
Account Number: 96785	**Account Description:** EDCA Administration	**Customer Name:** Economic Development	
Grant Funded? Yes No x	**Mandate?** Yes No x **Mandate Source:**		

Project Goal

To enhance Economic Development's Salesforce instance with customizations, integrations, and other application development, so that user adoption is increased, and reporting metrics, intake process, and outreach can become more efficient and standardized.

Business Objective

Improve the tracking of Retention and Attraction activities/correspondences with companies and other key stakeholders.

Track data related to past, present and future events, attendees, contacts and communication where staff can quickly view customer engagement activities and utilize best practices for marketing communications.

Expand the use of Salesforce into other divisions and additional staff within Economic Development.

Major Deliverables

Examples include:

- Enhance Salesforce Lightning UI
  - Form Page Design and Layout Enhancements
  - Field level drop down box standardization
  - Data Standardization & Classification Reviews
  - Report Cleanup
  - Dashboard Optimization & Report Creation based on Key Performance Indicators and other related metrics

Project Name: Economic Development Salesforce Enhancements (2023-24)   Project ID: D13191SF

- Replace for the Salesforce to Outlook Connector
- Review, test, and activate Salesforce functionality releases
- Replace current data backup utility with a more robust & efficient solution
- Create a full sandbox environment to test data loads and for users to test new functionality
- Research, develop and implement Salesforce Campaigns and applicable integrations

Approach
- Review current business process and conduct needs assessment with customer, ensuring current manual processes are refined and automated.
- Document system requirements
- Determine and document system architecture and diagram
- Assess User Hardware and Software Requirements
- Conduct Tech Review
- Order software if needed
- Develop Implementation Plan
- Develop new functionality
- Develop User Acceptance Test Plan
- Test new functionality
- Acquire User Acceptance Sign off
- Conduct Change Control
- Develop User Documentation, Service Center Knowledge Documents
- Train users on new system
- Release new functionality into production

Research & Analysis

Gartner Research Recommendation

Benefits

See Return on Investment (ROI) Analysis Document

Impact

Number of Users	30
Divisions	All of Economic Development
Leadership Groups	Finance/Admin

Oakland County
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Risk

Business Environment   Medium - Project will require some changes to existing business processes.

Technical Environment   Medium - Previously implemented technologies with new aspects and/or new requirements.

Assumptions

Staffing   IT Staffing: resources will be available for the hours indicated per the attached project plan.

Other Staffing: additional staffing will be available as follows:

Role:	Name	Hours per Day
Project Sponsor:	Laura Dodd	As needed

Facilities

-
-

Technical

-
-

Funding

-

Other

-

Priority

Project Name: Economic Development Salesforce Enhancements (2023-24)   Project ID: D13191SF

Constraints

-
-

Exclusions

- This does not include bringing other departments onto Salesforce

Oakland County
Department of Information Technology
Project Scope and Approach

Project Name: Economic Development Salesforce Enhancements (2023-24)   Project ID: D13191SF

PROJECT PHASE AUTHORIZATION

Phase(s): ED Salesforce Enhancements 2023-24		
Total Estimated Application Services **Hours: 1,460**		
Total Estimated Technical Systems **Hours: 40**		
Total Estimated CLEMIS **Hours:**		
Total Estimated Internal Services **Hours:**		
IT Application Services Division Manager Approval:		**Date:**
IT Technical Systems Division Manager Approval:		**Date:**
IT CLEMIS Division Manager Approval:		**Date:**
IT Internal Services Division Manager Approval:		**Date:**
IT Management Approval:		
Approved: Yes No		Date:
Reason:		
Project Sponsor Approval:		
Title:		Date:

PROJECT SUMMARY

Authorized Development (see above) **Hours: 1,500**	
Previously Authorized Development **Hours:**	
Preliminary Estimated Development for Future Phases **Hours:**	
Grand Total Estimated Development **Hours: 1,500 Cost: $247,500**	

Project Name: Economic Development Salesforce Enhancements (2023-24)   Project ID: D13191SF

PROJECT COMPLETION AUTHORIZATION

Customer Acceptance of Product:	
Title:	Date:
Project Office Review:	Date:

Economic Development Salesforce Enhancements (2023-24) - Size Estimate (+/- 10% to 50%) ✕

	Type	ID	Task Name	Estimated Hours	Estimate Notes	
1	Phase	000000	⊟ ED Salesforce Enhancements 2023-24	1,500		
2						

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Date: 04/29/2022

Return on Investment Analysis

Project Summary

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Benefits/Savings:							
Tangible Benefits Subtotal:	1,316	1,316	1,316	1,316	1,316	1,316	7,896
Cost Avoidance Subtotal:	40,306	40,572	40,840	41,111	41,385	41,661	245,875
Costs:							
Development Services Subtotal:	123,750	163,288	38,247	38,821	39,403	39,994	443,503
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	5,299	5,299	5,299	5,299	5,299	5,299	31,791
Infrastructure Subtotal	0	0	0	0	0	0	0
Training Subtotal:	8,000	0	0	0	0	0	8,000
Other Subtotal:	0	0	0	0	0	0	0
Annual Statistics:							
Annual Total Savings	41,622	41,888	42,156	42,427	42,701	42,977	253,771
Annual Total Costs	137,049	168,587	43,546	44,119	44,702	45,293	483,294
Annual Return on Investment	(95,427)	(126,699)	(1,390)	(1,692)	(2,001)	(2,315)	(229,523)
Annual Costs/Savings Ratio	329.27%	402.47%	103.30%	103.99%	104.69%	105.39%	
Project Cumulative Statistics:							
Cumulative Total Savings	41,622	83,510	125,666	168,093	210,794	253,771	253,771
Cumulative Total Costs	137,049	305,635	349,181	393,300	438,002	483,294	483,294
Cumulative Return on Investment	(95,427)	(222,125)	(223,515)	(225,207)	(227,208)	(229,523)	(229,523)
Cumulative Cost/Savings Ratio	329.27%	365.99%	277.86%	233.98%	207.79%	190.44%	190.44%
Year Positive Payback Achieved							NO PAYBACK
State or Federal Mandate?							
Signatures:							
Benefits Reviewed By Project Sponsor				Date:			
Costs (including IT Resources) Reviewed By Information Technology Project Manager				Date:			

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Date: 04/29/2022

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Quickly view customer engagement activities and utilize best practices for marketing communications.	Intangible Benefit					0	
Replace Spanning Backup Environment with a more robust & efficient solution would save the cost of Spanning licensing.	Tangible Benefit		ANN	1	1,316	1,316	
Replacing the Spanning Backup Environment would prevent the County from purchasing an additional full sandbox for the QA Environment.	Cost Avoidance		ANN	1	13,734	13,734	
Implement Campaigns within Salesforce and integrate with an event registration system to create effective tracking mechanisms as well as create efficient communications with clients via GovDelivery. (2 hours weekly x 52 weeks)	Cost Avoidance		ANN	104	73	7,592	1.010
Qualtrics survey integration will allow for surveys to be sent to companies/contacts in Salesforce so that ED staff will have an understanding of client needs.	Intangible Benefit					0	
Salesforce Lightning UI, Workflow Data Standardization Enhancements will increase ED staff productivity and assist with data reliability.	Intangible Benefit					0	
Replace the soon to be retied Salesforce to Outlook Connector with another technology that is compatible with Salesforce and our existing Office 365 environment which will create a more efficient user experience.	Intangible Benefit					0	
Increased Reporting Metrics	Intangible Benefit					0	

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Expand user documentation for increased efficiency and training experiences. (Avg 5 hours weekly x 52 weeks)	Cost Avoidance		ANN	260	73	18,980	1.010
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
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						0	
						0	
						0	
						0	
						0	

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Quickly view customer engagement activities and utilize best practices for marketing communications.	Intangible Benefit												
Replace Spanning Backup Environment with a more robust & efficient solution would save the cost of Spanning licensing.	Tangible Benefit	x	x	x	x	x	x	1,316.00	1,316.00	1,316.00	1,316.00	1,316.00	1,316
Replacing the Spanning Backup Environment would prevent the County from purchasing an additional full sandbox for the QA Environment.	Cost Avoidance	x	x	x	x	x	x	13,734.00	13,734.00	13,734.00	13,734.00	13,734.00	13,734
Implement Campaigns within Salesforce and integrate with an event registration system to create effective tracking mechanisms as well as create efficient communications with clients via GovDelivery. (2 hours weekly x 52 weeks)	Cost Avoidance	x	x	x	x	x	x	7,592.00	7,667.92	7,744.60	7,822.05	7,900.27	7,979
Qualtrics survey integration will allow for surveys to be sent to companies/contacts in Salesforce so that ED staff will have an understanding of client needs.	Intangible Benefit												
Salesforce Lightning UI, Workflow Data Standardization Enhancements will increase ED staff productivity and assist with data reliability.	Intangible Benefit												
Replace the soon to be retied Salesforce to Outlook Connector with another technology that is compatible with Salesforce and our existing Office 365 environment which will create a more efficient user experience.	Intangible Benefit												
Increased Reporting Metrics	Intangible Benefit												

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Expand user documentation for increased efficiency and training experiences. (Avg 5 hours weekly x 52 weeks)	Cost Avoidance	x	x	x	x	x	x	18,980.00	19,169.80	19,361.50	19,555.11	19,750.66	19,948

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Return on Investment Analysis

Savings Summary

Benefit/Savings Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Tangible Benefit:							
Replace Spanning Backup Environment with a more robust & efficient solution would save the cost of Spanning licensing.	1,316	1,316	1,316	1,316	1,316	1,316	7,896
Tangible Benefits Subtotal:	*1,316*	*1,316*	*1,316*	*1,316*	*1,316*	*1,316*	*7,896*
Cost Avoidance:							
Implement Campaigns within Salesforce and integrate with an event registration system to create effective tracking mechanisms as well as create efficient communications with clients via GovDelivery. (2 hours weekly x 52 weeks)	7,592	7,668	7,745	7,822	7,900	7,979	46,706
Expand user documentation for increased efficiency and training experiences. (Avg 5 hours weekly x 52 weeks)	18,980	19,170	19,361	19,555	19,751	19,948	116,765
Replacing the Spanning Backup Environment would prevent the County from purchasing an additional full sandbox for the QA Environment.	13,734	13,734	13,734	13,734	13,734	13,734	82,404
Cost Avoidance Subtotal:	*40,306*	*40,572*	*40,840*	*41,111*	*41,385*	*41,661*	*245,875*
Intangible Benefit:							
Quickly view customer engagement activities and utilize best practices for marketing communications.							
Qualtrics survey integration will allow for surveys to be sent to companies/contacts in Salesforce so that ED staff will have an understanding of client needs.							
Salesforce Lightning UI, Workflow Data Standardization Enhancements will increase ED staff productivity and assist with data reliability.							
Replace the soon to be retied Salesforce to Outlook Connector with another technology that is compatible with Salesforce and our existing Office 365 environment which will create a more efficient user experience.							
Increased Reporting Metrics							
Savings Total:	*41,622*	*41,888*	*42,156*	*42,427*	*42,701*	*42,977*	*253,771*

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Date: 04/29/2022

Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development	Development Svcs		HR	1,500	165	247,500	1.015	x	x				
IT Hours - System Maintenance	Development Svcs				165	0							
IT Hours - Customer Support	Development Svcs		HR	150	165	24,750	1.015		x	x	x	x	x
IT Hours - Planned Maintenance	Development Svcs		HR	75	165	12,375	1.015		x	x	x	x	x
User Hours - New Development	Development Svcs					0							
User Hours - PTNE/OT	Development Svcs					0							
Contractor Professional Services	Development Svcs					0							
File Space (100GB)	Hardware		ANN		23	0							
Package Software - Acquisition (Qualtrics)	Software		EA	3	1,250	3,750		x					
Package Software - Maintenance (Qualtrics)	Software		EA	3	1,250	3,750			x	x	x	x	x
Package Software - Acquisition (OwnBackup)	Software		EA	25	62	1,549		x					
Package Software - Maintenance (OwnBackup)	Software		EA	25	62	1,549			x	x	x	x	x
SSL Certificate	Infrastructure				845	0							
Internet Access	Infrastructure				180	0							
Imperva Web Application Firewall (External Web Applications Only)	Infrastructure		ANN		500	0							
App Code Directories on Consolidated IIS Server (Virtual)	Infrastructure		ANN		415	0							
Dedicated Virtual Server	Infrastructure		ANN		4,150	0							

Affects Project ROI? (columns Y1–Y6)

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development	Development Svcs	123,750.00	125,606.25				
IT Hours - System Maintenance	Development Svcs						
IT Hours - Customer Support	Development Svcs		25,121.25	25,498.07	25,880.54	26,268.75	26,662.78
IT Hours - Planned Maintenance	Development Svcs		12,560.63	12,749.03	12,940.27	13,134.37	13,331.39
User Hours - New Development	Development Svcs						
User Hours - PTNE/OT	Development Svcs						
Contractor Professional Services	Development Svcs						
File Space (100GB)	Hardware						
Package Software - Acquisition (Qualtrics)	Software	3,750.00					
Package Software - Maintenance (Qualtrics)	Software		3,750.00	3,750.00	3,750.00	3,750.00	3,750.00
Package Software - Acquisition (OwnBackup)	Software	1,548.50					
Package Software - Maintenance (OwnBackup)	Software		1,548.50	1,548.50	1,548.50	1,548.50	1,548.50
SSL Certificate	Infrastructure						
Internet Access	Infrastructure						
Imperva Web Application Firewall (External Web Applications Only)	Infrastructure						
App Code Directories on Consolidated IIS Server (Virtual)	Infrastructure						
Dedicated Virtual Server	Infrastructure						

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Date: 04/29/2022

Return on Investment Analysis

Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Development Services:							
IT Hours - New Development	123,750	125,606					249,356
IT Hours - System Maintenance							
IT Hours - Customer Support		25,121	25,498	25,881	26,269	26,663	129,431
IT Hours - Planned Maintenance		12,561	12,749	12,940	13,134	13,331	64,716
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services							
Development Services Subtotal:	*123,750*	*163,288*	*38,247*	*38,821*	*39,403*	*39,994*	*443,503*
Hardware:							
Hardware Subtotal:							
Software:							
Package Software - Acquisition (Qualtrics)	3,750						3,750
Package Software - Maintenance (Qualtrics)		3,750	3,750	3,750	3,750	3,750	18,750
Package Software - Acquisition (OwnBackup)	1,549						1,549
Package Software - Maintenance (OwnBackup)		1,549	1,549	1,549	1,549	1,549	7,743
Software Subtotal:	*5,299*	*5,299*	*5,299*	*5,299*	*5,299*	*5,299*	*31,791*
Infrastructure:							
Infrastructure Subtotal							
Training:							
Project Staff Training (Qualtrics)	8,000						8,000
Training Subtotal:	*8,000*						*8,000*
Other:							
Other Subtotal:							
Costs Total:	**137,049**	**168,587**	**43,546**	**44,119**	**44,702**	**45,293**	**483,294**

Oakland County -- Economic Development Salesforce Enhancements (2023-24)

Return on Investment Analysis

Assumptions

Date	Assumption Description
28-Feb-22	Assuming the hourly rate for the staff cost avoidance is $73/hour (including salary and fringes)
28-Feb-22	Assuming the purchase of an additional Salesforce sandbox would be $13,734 per year, based on quote 30506321 received from Carahsoft
29-Apr-22	Pricing for OwnBackup is from the State of MI Salesforce contract (https://www.michigan.gov/dtmb/-/media/Project/Websites/dtmb/Procurement/Contracts/MiDEAL-Media/001/071b6600108.pdf); $37.81/user annually plus sandbox seeding at $24.13/user annually. Total is $61.94/user. Assuming 25 Econ Dev users. This is one option for a backup solution, but may not be the final selected option.
29-Apr-22	Qualtrics licensing costs are estimated based on email from Trey Hanson (treyh@qualtrics.com) on 1/28/22: "My rough estimation is that we would be looking at a range of roughly $1,000 - $1,500 per employee in annual licensing. We would also want/need to incorporate some implementation and training services. That would be a one-time cost of approximately $7-9K". On the ROI, the training cost was estimated to be the average of these numbers ($8,000). The per user cost was estimated to be $1250/user. It was also assumed that only 3 the Econ Dev staff would actually require a license because of the following info from Trey Hanson: "Any data that you pass into Salesforce will only require that people be able to access it in Salesforce (and not that they also require a Qualtrics license to access the data in Salesforce)."