



### **1) What are some short-term projects that CRISP is looking on right now?**

To use CRISP services today a doctor must undergo an onboarding process in which first the organization signs a document between the company and CRISP and then each doctor goes to our website and individually signs up. Let's say we need to make a workflow change to that process due to changes in the regulations. Here we would need Salesforce developers to go in and change the registration process. Another scenario can be the need of developers to change the business rules around who can access a certain kind of system and all kind of credentialing that happens in the Salesforce. Another requirement can be that our sales team wants to go out and ask every account 12 questions, so we would need developers to create a form with just those 12 questions and space for the answers.

### **2) Do you have large chunk of codes right now in Salesforce?**

We have two large chunks. One is the registration process for CRISP, with about 50,000 people and the other one is a couple of inbuilt tools. For e.g. a point of contact audit tool in which you audit the number of users under a particular organization and then add or delete users based on your findings.

### **3) Do you have any inhouse SFDC developer and admin?**

Zero developers and one part time admin.

### **4) Do you use SFDC classic or lightning?**

We use SFDC Classic, but if need comes then can move to SFDC Lightning in the near future.



**5) Number of people using salesforce for day today job?**

50-80

**6) One of the requirement was “Focus on reducing administrative overhead and maintenance costs associated with maintaining multiple systems on multiple platforms and enhancing reporting capabilities, accuracy and accessibility”. What does multiple systems refer to?**

We have an identity and access management platform which is outside of salesforce yet all the core demographics for every customers are kept in salesforce. Could we consolidate our identity management system into salesforce? In addition, we have some manual process today for getting users access that I think can be consolidated into salesforce more effectively. We require it particularly for consolidating customer facing business processes.

**7) Do you have any projects in pipeline and how would you prioritize the projects?**

We do have 2-3 projects in the pipeline right now and we want to move ahead with “as per requirement” basis in which the team would come in once we encounter problem, finish the task and come back again once some other problem arises.

**8) Are there any sales force third party application that you currently use?**

None.

**9) What would be your budget?**

We are looking for anything between 20-30K per month.