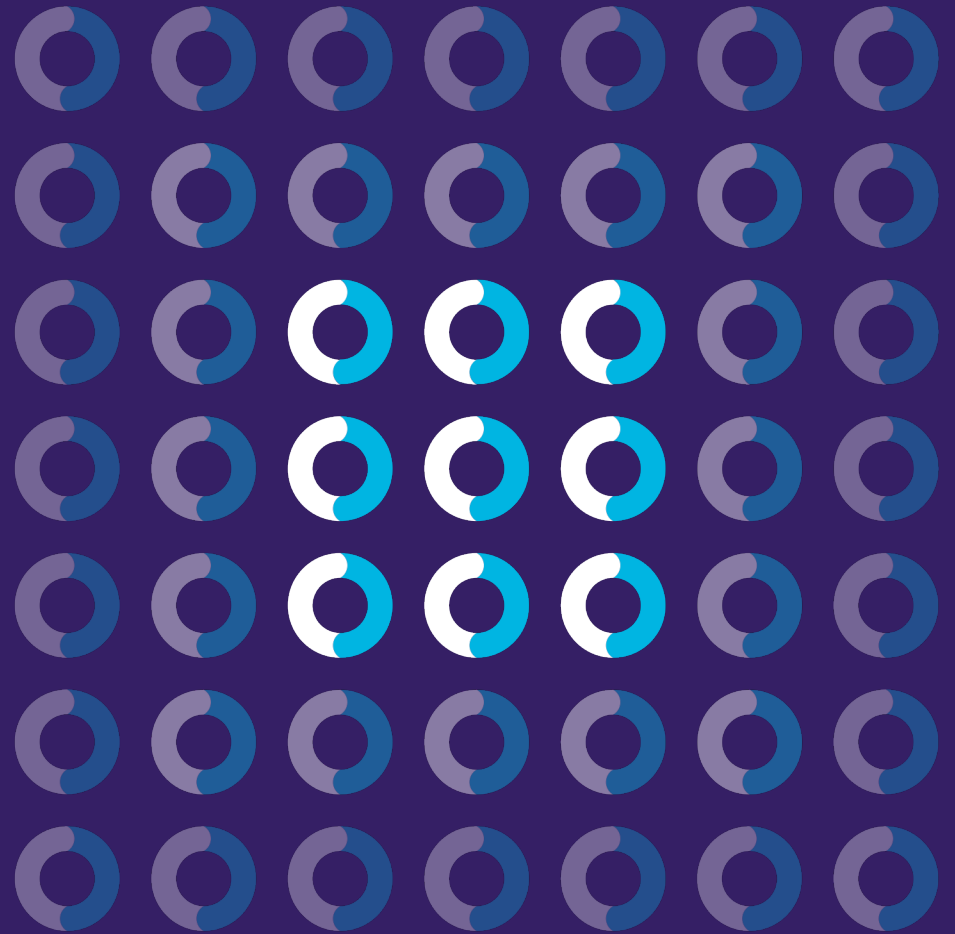




# Salesforce Quick Reference Guide: RFP Request Process

Updated for Lightning  
May 2020



# Process for Sale and Client Management

1. Create an Opportunity and an RFP Support Request.
2. Complete RFP Request form (all required fields and as much other information as possible).
3. Attach RFP documents.
4. Receive acknowledgment. (Proposal lead then contacts requestor.)

Upon completion of RFP response:

5. Complete 3-minute satisfaction survey.

# RFP Support Request Workflow Automation

The RFP Support Request workflow has been automated in Salesforce, specifically the process for Sales and Client Management to request support from the Proposal Development team and subsequent reporting.

The scope is for responses to RFPs and RFIs, as well as other documents for which the Proposal team may provide support. Specific objectives are to:

1. Associate proposals with specific opportunities to enable accurate outcome reporting
2. Collect information required to begin proposal efforts
3. Enable notifications that promote timely initiation of proposal efforts
4. Enable automated reporting of additional proposal and related opportunity data

# RFP Support Request Process

Request RFP support in Salesforce:

1. Create an Opportunity or navigate to an existing Opportunity.
2. Select the Create RFP Request button.

The screenshot displays a Salesforce Opportunity record for 'NDR Test'. The record is in the 'Prospect' stage. The 'Create RFP Request' button is highlighted with a red box and a '2' callout. The 'Details' tab is active, showing fields for Opportunity Owner (Kevin McTest), Opportunity Name (NDR Test), Account Name (NDR Test Account), Client Manager (Natalie Raines), Type (New Business), Sub-Type, RFP Finalist (checkbox), and Business Region (USA). A 'Related List Quick Links' section on the right provides links to Quotes (2), Contracts (0), Octiv Documents (0), Open Activities (0), Products (2), Broker Opportunity Relations (0), RFPs (0), and Activity History (0).

| Details           | Products                         | SPARK | Broker Opportunity Relations | Octiv Documents          | RFP | More |
|-------------------|----------------------------------|-------|------------------------------|--------------------------|-----|------|
| Opportunity Owner | <a href="#">Kevin McTest</a>     |       | Type ⓘ                       | New Business             |     |      |
| Opportunity Name  | NDR Test                         |       | Sub-Type ⓘ                   |                          |     |      |
| Account Name      | <a href="#">NDR Test Account</a> |       | RFP Finalist ⓘ               | <input type="checkbox"/> |     |      |
| Client Manager ⓘ  | Natalie Raines                   |       | Business Region ⓘ            | USA                      |     |      |

**Related List Quick Links** ⓘ

- [Quotes \(2\)](#)
- [Contracts \(0\)](#)
- [Octiv Documents \(0\)](#)
- [Open Activities \(0\)](#)
- [Products \(2\)](#)
- [Broker Opportunity Relations \(0\)](#)
- [RFPs \(0\)](#)
- [Activity History \(0\)](#)

[Show All \(14\)](#)

# New RFP Record

3. A screen will open to create the RFP Response.
4. The Opportunity name will auto-populate.
5. Complete all required fields (marked with a \*).
6. Save.
7. A green bar will pop up briefly to confirm creation. Click the RFP name to view the new record.
8. Upon saving, a notification will be sent to your email confirming your submission.
9. The RFP Team will receive an email notifying them of a new RFP.

3 Create RFP Request

\* Response Name: NDR Gen Med RFP

Response Status: New

Response Type: RFP

Owner: Kevin McTest

Win Probability: 25% or Less

\* Release Date: 6/15/2020

RFP Known: Yes

\* Due Date: 6/8/2020

Is Incumbent: No

Ship Date:

Incumbent Info:

Anticipated Award Date:

Competition:

Client Relationship:

Client Objectives:

Delivery Format: Available (Hard, Portal, CD) / Chosen (Email)

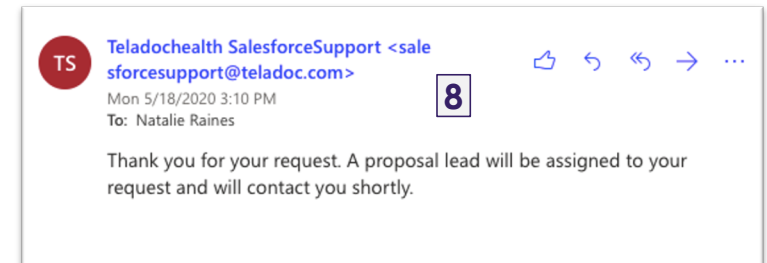
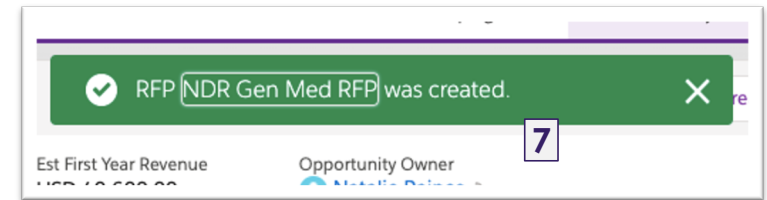
Products / Services: Available (Behavioral Health C..., Expert Medical Serv..., Licensed Platform, Virtual Care Optimiz..., Other) / Chosen (Telehealth Services)

Opportunity: NDR Test May

4

6

Cancel Save



# Review

## 9. Review the Response details.

**RFP**  
**NDR Gen Med RFP**

Edit Delete New Note

Files (0) Notes (0) RFP History (1)

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**Details** Related

|                     |                     |   |                        |                              |   |
|---------------------|---------------------|---|------------------------|------------------------------|---|
| Response Name       | NDR Gen Med RFP     | / | Response Status        | New                          | / |
| Response Type       | RFP                 | / | RFP Requester          | <a href="#">Kevin McTest</a> | / |
| Win Probability     | 25% or Less         | / | Owner                  | RFP Requests Queue           | / |
| RFP Known           | Yes                 | / | Secondary Owner        |                              | / |
| Is Incumbent        | No                  | / | Request Date           | 5/18/2020                    | / |
| Incumbent Info      |                     | / | Release Date           | 6/15/2020                    | / |
| Competition         |                     | / | Due Date               | 6/8/2020                     | / |
| Delivery Format     | Email               | / | Ship Date              |                              | / |
| Next Step           | NA                  | / | Anticipated Award Date |                              | / |
| Level of Effort     |                     | / | Client Relationship    |                              | / |
| Products / Services | Telehealth Services | / | Client Objectives      |                              | / |

▼ Opportunity Information

|                        |  |   |                          |  |  |
|------------------------|--|---|--------------------------|--|--|
| Opportunity            | <a href="#">NDR Test May</a>                     |   | Opportunity Name         | NDR Test May                                     |  |
| Broker / Consultant    |  |   | Opportunity Type         | New Business                                     |  |
| Opportunity Stage      | Qualified  |   | Customer Type            | Employer   |  |
| Customer Name          | NDR Test Account                                 |   | Sales Channel            | US Employer                                      |  |
| Membership Type        |  |   | Annual Recurring Revenue | USD 15,600.00                                    |  |
| Lives Covered          | 500  |   | One Time Revenue         | USD 25,000.00                                    |  |
| Revenue Effective Date | July 1, 2020                                     |   | In Year Revenue          | USD 7,800.00                                     |  |
| Created By             | <a href="#">Kevin McTest</a> , 5/18/2020 1:52 PM |   | Last Modified By         | <a href="#">Kevin McTest</a> , 5/18/2020 1:52 PM |  |
| Record Type            | Edit   | / |                          |  |  |

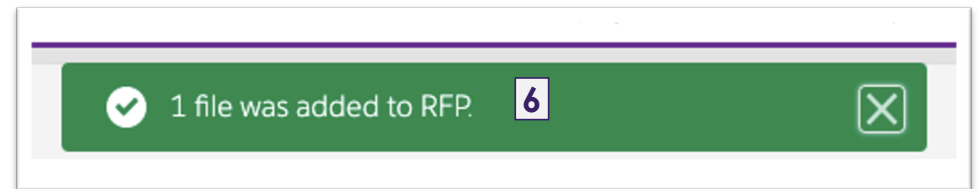
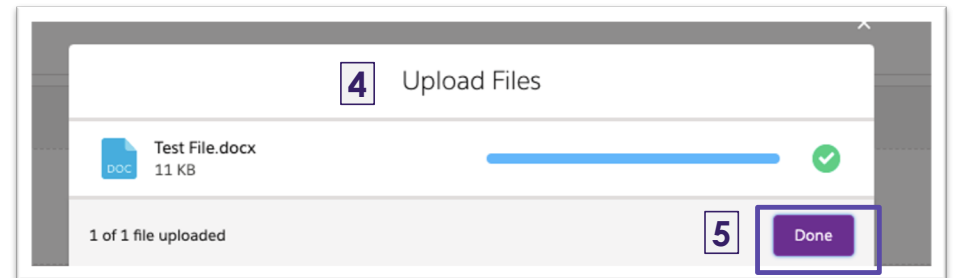
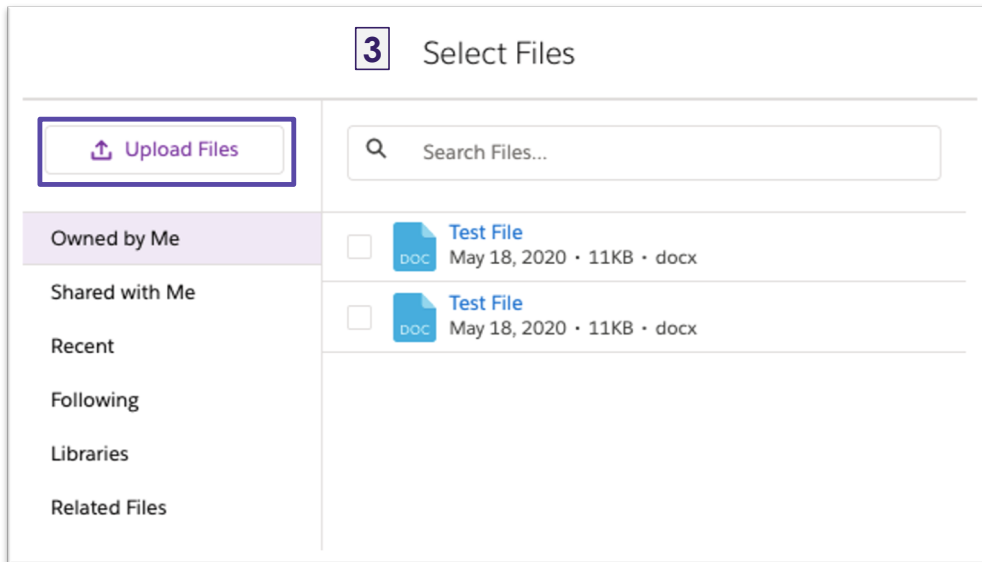
# Attach Files to Record

1. To add documents to support the RFP process to the request record, choose the Related tab on the Opportunity.
2. In the Files section, choose Add Files.

The screenshot displays the 'NDR Gen Med RFP' record page. At the top, there are tabs for 'Files (0)', 'Notes (0)', and 'RFP History (1)'. The 'Related' tab is selected and highlighted with a purple box and a '1' in a square. Below the tabs, the 'Files (0)' section is visible, containing an 'Add Files' button highlighted with a purple box and a '2' in a square. Below the 'Add Files' button is an 'Upload Files' button and the text 'Or drop files'. At the bottom of the page, there is a 'Notes (0)' section with a 'New' button. The page also includes 'Edit', 'Delete', and 'New Note' buttons at the top right.

# Attach File Process

3. The next screen will allow you to choose or upload a file.
4. If you select Upload Files, a file selector will appear. Choose the file to upload.
5. Once complete, choose Done.
6. A green bar will appear to confirm that the file was uploaded and attached.



# View Files on RFP Record

Any files attached to the RFP record will be available through the Files link and in the Related tab.

The screenshot displays the interface for an RFP record titled "NDR Gen Med RFP". At the top right, there are buttons for "Edit", "Delete", and "New Note". Below the title, there are three tabs: "Files (1)", "Notes (0)", and "RFP History (1)". The "Files (1)" tab is highlighted with a purple box. Underneath, there are two sub-tabs: "Details" and "Related", with "Related" also highlighted by a purple box. The "Related" tab shows a section titled "Files (1)" with an "Add Files" button. Below this, a file named "Test File" is listed with a document icon, the text "DOC", and the details "May 18, 2020 · 11KB · docx". At the bottom center, there is a "View All" link.

# RFP Information on Opportunity

In the Opportunity, access related RFP requests via:

1. the RFP tab
2. Related List Quick Links.

Opportunity **NDR Test May**

Account Name: [NDR Test Account](#) | Revenue Effective Date: 7/1/2020 | Est First Year Revenue: USD 40,600.00 | Opportunity Owner: [Natalie Raines](#)

Progress: **Qualified** | Proposal | Review/Negotiation | Contracting | Closed | [Mark Stage as Complete](#)

Details | Broker Opportunity Relations | Octiv Documents | **RFP** | Files & Notes | More

Opportunity Owner: [Natalie Raines](#)

Opportunity Name: NDR Test May

Account Name: [NDR Test Account](#)

Client Manager: [Kevin McTest](#)

Type: New Business

Sub-Type

RFP Finalist:

Business Region: USA

Related List Quick Links

- [Quotes \(2\)](#)
- [Contracts \(0\)](#)
- [Octiv Documents \(8\)](#)
- [Open Activities \(0\)](#)
- [Products \(10+\)](#)
- [Broker Opportunity Relations \(0\)](#)
- [RFPs \(1\)](#)
- [Activity History \(0\)](#)

[Show All \(14\)](#)

## Post-RFP Survey

- Once the RFP response has been completed and the RFP team changes the status to “Submitted,” the salesperson will receive an email with a link to a survey.
- The survey is anonymous and specific to the proposal lead they worked with.
- Click on the link to access the survey, which takes less than 3 minutes.
- The overall responses (for whole team or by proposal writer) will be used to determine what the team should focus on for improvement.

### Sample Email

<SALESPERSON>,

You recently worked with Stacy Smith to complete the <NAME OF RFP> response. To help us continually improve our ability to support you, please take this 3-minute blinded survey: <https://protect-us.mimecast.com/s/BwodCNk189to7ggpumVZyg?domain=questionpro.com>

Thank you for your help.

Tracy Warren  
Director, Proposal Development  
Teladoc Health, Inc.  
508-494-5335  
[twarren@teladochealth.com](mailto:twarren@teladochealth.com)