REQUEST FOR INFORMATION # 2012-08-1700

FOR

Customer Relationship Management (CRM)

AS PER THE SPECIFICATIONS LISTED HEREIN

PROPOSAL DUE DATE: 08/10/2012

PROPOSAL DUE TIME: 9:00 AM, EST

REQUESTED BY: Luba Cramer

THE UNIVERSITY OF AKRON
DEPARTMENT OF PURCHASING

Vendor: Salesforce.com Foundation
1.0 REQUEST FOR INFORMATION

1.1 GENERAL INFORMATION

To be guaranteed the fullest consideration, all information should be submitted on or before 9 A.M. local time, on August 10, 2012. The University prefers that all information and supporting documents be submitted electronically through the Public Purchase bidding tool and must be in either Microsoft Word or Adobe PDF format.

All questions are to be submitted through the electronic bidding tool which will allow all bidders to see submitted questions and the answers.

The bidding tool is located at:
Vendor Registration-http://www.publicpurchase.com/gems/uakron,oh/browse/home
Bid Board-http://www.publicpurchase.com/uakron,oh
Additional vendor support is provided via live Chat in the upper left corner, support@publicpurchase.com or call 801-932-7000.

If information submission is sent via U.S. Mail, please use the following address: The University of Akron, Department of Purchasing, Lincoln Building, 2nd floor, Akron, Ohio 44325-9001. If sending via courier, overnight air, hand delivery, etc., please use the following address: The University of Akron, Department of Purchasing, 100 Lincoln Street, Akron, Ohio 44325-9001. If submitting hard copy, each Vendor shall submit the following materials to the University at the address provided above: (1) hard copy of its information, and (1) one CD containing searchable, non-password protected files (e.g., accessible Microsoft Word and/or Microsoft Excel files) of its information. Each response shall be placed in an envelope or package with the complete name of the Vendor and the RFI number printed on the envelopes or package’s address label so that it can be properly identified upon arrival. Responses that do not conform to this request may not be considered.

All questions must be submitted through Public Purchase. All communications regarding this RFI MUST filter through the Purchasing Department.

2.1 SCOPE OF INFORMATION

The University of Akron currently would like information regarding Customer Relationship Management (CRM) tools for higher education. Specifically the University is looking for a solution that will help with student recruitment, retention, and ongoing contact after graduation.

The University expects to solicit proposals from qualified suppliers capable of providing the maximum benefit to the University and the selected supplier.
The University of Akron RFI # 2012-08-1700
Due Date: 08/10/2012, 9:00 AM

The University intends to receive questions from interested suppliers concerning current operations and will provide responses back to the best of our ability and knowledge. All questions are to be submitted in writing through the Public Purchase tool which requires supplier registration. Questions and answers will be shared with all registered suppliers. This is the only forum to ask and receive answers concerning this project. Other forms of contact may be deemed an attempt to gain an unfair competitive advantage in this process and, therefore, may be reason for a supplier to be disqualified from further participation and contract award.

After the RFI closes, the University intends to review the responses, interview selected solution providers, and invite vendors of its choosing to provide system demonstrations. The University will then determine if it wishes to move forward with an RFP.

The overriding goal of this RFI and possible subsequent RFP is to develop a best in class CRM solution for higher education with a qualified supplier that will assist the University achieve its mission and goals as set forth in the recently approved strategic plan “Vision 2020”.

The University of Akron Board of Trustees gave its unanimous support to a new strategic plan called Vision 2020. The year 2020 is the 150th anniversary of the founding of the University, and the plan calls for bold initiatives and significant growth, including:

- Building on Charting the Course accomplishments, reach a $1 billion investment in student programs, faculty, research, campus and community

- A more than 30 percent increase in enrollment from the current 30,000 to 40,000 learners, including growth of students in and out of state, international students and e-learners

- $200 million commitment in annual research expenditures, including hiring 160 new faculty and staff

- Launching The Akron Experience, a new initiative that provides every student with a unique in-and-out-of-the-classroom learning experience to strengthen the connection between campus and community

- New criteria for enrollment and targeted learning pathways for each student to increase retention, graduation and job-placement rates
The entire strategic plan is available at “Vision 2020”.

2.2 Request for Information – Customer Relationship Management (CRM)

The information gathered from this RFI will assist in identifying vendors to invite in for presentations and demonstrations, which will in turn facilitate in the design and development of a potential Request for Proposal (RFP). Please address the numbered items listed below.

Please provide information on the offered Customer Relationship Management (CRM) software/hardware solution that will serve the various campus operations which:

1. Describes the components of the solution including both software and hardware

   Salesforce.com only requires a computer that can run a web browser and an Internet connection. No other software or hardware is required.

2. Describes how the products and modules are licensed

   Salesforce.com does not license or sell the software we develop; it is only offered as a subscription-based Internet Service. The Salesforce.com Sales Cloud - Foundation Enterprise Edition is sold as a named user subscription with fees per named users per year.

3. Describes the relationships with third-party vendors; highlight any partnerships

   As the industry leader, Salesforce.com has delivered cloud computing to more than 104,000 customers around the world. Partners play a critical role in this process by helping our customers succeed with industry-leading Salesforce CRM applications and Force.com platform technologies. Over the past 12 years, thousands of partners have built successful businesses around Salesforce.com's technologies and distribution channels.

   Partners work with Salesforce.com through a variety of proven partner programs that drive growth and customer success. This ecosystem includes independent software vendor (ISV) looking to build commercial apps for the Salesforce cloud or a consulting firm looking to deliver cloud computing solutions for our customers.

   **AppExchange**

   The AppExchange is your one-stop shop for cloud computing business applications and services. With just a mouse and a Force.com account, you can easily find, test drive, and install hundreds of pre-integrated applications from our partner community. The AppExchange lets you extend Force.com to every department and function. To date, there have been more than 1,000,000+ installations of 1300+ apps by customers.

   Instead of dedicating time and resources to build an in-house application, you can easily install a pre-integrated and validated solution that you can customize for your business needs, and be up and running in a fraction of the time.

   With the AppExchange, you can tap into the power of the salesforce.com community to see which applications are the most popular, read reviews from your peers, and share your experiences.
Instead of engaging in lengthy pilots, the AppExchange makes it easy for you to quickly evaluate an application's functionality through a "test drive." A test drive lets you interact with an application in a sample salesforce.com instance in one click, so you can kick the tires. For an even deeper dive, you can install an application in your sandbox or production environment before you deploy it to other users in your organization. This approach lets you see exactly how the application would work in your Salesforce.com org with your customizations.

Explore the AppExchange options here: http://appexchange.salesforce.com/home

4. Describes how the solution generally performs enterprise integration

Salesforce.com supports both synchronous and asynchronous integration. The most common synchronous integration is composite or mashups applications that provide presentation layer integration in real time to external Web services or applications. Synchronous integration at the application layer is supported via Salesforce SOA (also known as Callouts). With Salesforce SOA, customers can use the Force.com platform to consume external web services in real time based on an event that occurs in Salesforce.com. Additionally, Salesforce provides custom Web services that give customers the ability to expose any logic written in Apex Code as a web service with only a few clicks.

The Web Services APIs provide access to your Force.com data and logic. The core set of APIs include the Force.com SOAP and REST-based Web Service APIs, the Bulk API, and the Metadata API. You can call these APIs from a wide variety of client-side languages - and toolkits are also available to ease the integration.

5. Describes the security and approval setup, structure and process

All users and application level security are defined and maintained by the organization administrator, and not by Salesforce.com. The organization administrator is appointed by the customer. An organization's sharing model sets the default access that users have to each other's data.

There are four sharing models: Private, Public Read Only, Public Read/Write, and Public Read/Write/Transfer. There are also several sharing model elements: Profiles, Roles, Hierarchy, Record Types, Page Layouts, and Field Level security.

Details about sharing models and sharing model elements are provided below:

**Private**
Only the record owner, and users above that role in the hierarchy, can view, edit, and report on those records.

**Public Read Only**
All users can view and report on records but not edit them. Only the owner, and users above that role in the hierarchy, can edit those records.

**Public Read/Write**
All users can view, edit, and report on all records.

**Public Read/Write/Transfer**
All users can view, edit, transfer, and report on all records. Only available for cases or leads.

**Profiles**
A profile defines a user's permission to perform different functions within salesforce.com. Profiles also control the following:

- Which page layouts the user sees
- The field-level security access that the user has to view and edit specific fields
- Which tabs the user can view
- Which record types are available to the user
- The hours and IP addresses from which the user can log in
- Administrators, and users with the "Manage Users" permission, can create, edit, and delete profile

User Roles
Every user must be assigned to a role, or their data will not display in opportunity reports, forecast rollups, and other displays based on roles.

- All users that require visibility to the entire organization should be assigned the highest level in the hierarchy.
- It is not necessary to create individual roles for each title at the company; rather a hierarchy of roles should be defined to control access of information entered by users in lower level roles.
- When a user's role is changed, any relevant sharing rules are reevaluated to add or remove access as necessary.

Record Types
If the customer's organization uses record types, edit the record type to modify which pick list values are visible for the record type. A default pick list values can be set based upon the record type for various divisions.

Field Level Security
Field-level security settings let administrators restrict user's access to view and edit specific fields on detail and edit pages and in related lists, list views, reports, Offline Edition, search results, email and mail merge templates, Custom Links, and when synchronizing data.

The fields that users see in detail and edit pages are a combination of page layouts and field-level security settings. The most restrictive field access settings of the two always apply. For example, if a field is required in the page layout and read-only in the field-level security settings, the field-level security overrides the page layout and the field will be read-only for the user.

6. Describes how the system manages the definitions of rules, highlighting if the rules are configurable

Workflow and approval processes are defined through an intuitive point-and-click Setup environment. There is no programming, proprietary scripting or intense administrator work to facilitate Workflow automation.

Administrators begin by designing workflow rules and approval processes, and associating them with workflow actions, such as email alerts, tasks, field updates, or outbound messages.

7. Describes the standard reports that are offered as well as any tools offered for ad hoc reporting needs
Salesforce offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. All of our standard reports are "templates" so they can be used as report starting points from which users can alter fields, criteria, etc. and use the "Save As" function to easily capture a version more specific to their unique needs.

Users can also create new custom reports to access exactly the information they need. Subtotal and limit data to help users analyze trends and get a concise picture of what is happening in your organization.

A list of standard reports can be provided if necessary, however, an easy way to see them all is simply to log into your trial salesforce.com account and view the reports tab.

Salesforce.com offers a powerful suite of analytics tools to help you view and analyze your data. Salesforce.com analytics consists of several integrated parts:

- **Report Types**—A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. Salesforce.com provides a set of pre-defined standard report types; administrators can create custom report types as well.

  For example, an administrator can create a report type that shows only job applications that have an associated resume; applications without resumes won't show up in reports using that type. An administrator can also show records that may have related records—for example, applications with or without resumes. In this case, all applications, whether or not they have resumes, are available to reports using that type.

- **Reports**—A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access.

- **Dashboards**—A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. They provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components. Administrators control access to dashboards by storing them in folders with certain visibility settings. Dashboard folders can be public, hidden, or restricted to groups, roles, or territories. If you have access to a folder, you can view its dashboards. To view a dashboard component, users need access to the folder for the underlying source report.

  Each dashboard has a running user, whose security settings determine which data to display in a dashboard. If the running user is a specific user, all dashboard viewers see data based on the security settings of that user—regardless of their own personal security settings. For dynamic dashboards, you can set the running user to be the logged-in user, so that each user sees the dashboard according to his or her own access level.

- **Folders**—A folder is a place where you can store reports, dashboards, documents, or email templates. Folders can be public, hidden, or shared, and can be set to read-only or read/write. You control who has access to its contents based on roles, permissions, public groups, and license types. You can make a folder available to your entire organization, or make it private so that only the owner has access.

- **Analytic Snapshots**—An analytic snapshot lets you report on historical data. Authorized users can save tabular or summary report results to fields on a custom object, then map those fields to corresponding fields on a target object. They can then schedule when to run the report to load the custom object's fields with the report's data. Analytic snapshots let you to work with report data similarly to how you work with other records in Salesforce.com.

  For example, a customer support manager could set up an analytic snapshot that reports on the open cases assigned to his or her team everyday at 5:00 PM, and store that data in a custom object to build a history on open cases from which he or she could spot trends via reports. Then the customer support manager could
report on point-in-time or trend data stored in the custom object and use the report as a source for a dashboard component.

8. Describes the user interface

Salesforce.com conducts significant investments in usability research and we design our solutions to be highly usable as we believe a widely adopted and used system is the most important factor for success. We are consistently ranked as a market leader for the usability of our systems in independent research.

The emergence of 'Web 2.0' standards on the consumer web and the instant usability of sites such as Google, eBay, Amazon etc. are the basis of our end user experience which are in direct contrast to more complex traditional client/server applications and interfaces.

End users do not need to be trained on how to use web sites such as those described, even when conducting potentially complex transactions, and we believe the salesforce.com end user experience should be the same by using a naturally intuitive interface.

Specific usability features that are standard in our application include global search, a left tool bar with quick links, snap in components and an intuitive tabular layout. In addition, to make the user experience holistic and accessible anywhere, anytime and real-time, all functionality is available on mobile devices. Salesforce Mobile replicates the UI paradigms found in Salesforce proper. Tabs, list views, page layouts and related lists are fully supported and appear in familiar form.

The Salesforce data model is based on objects, which allows the application to be highly flexible. Users can create new record objects as well as designate both standard and custom fields within a configurable layout. Validation rules, workflow logic as well as preintegrated applications can be leveraged to extend the system even further. Ultimately, it is possible for your organization to achieve its most preferred system all within a point and click, drag and drop interface.

9. Describes the customer service model and support structure offered for the solution noting support differences if there is a tiered offering

We have three plans that benefit businesses of all sizes. Our most successful customers like the Premier Success Plan, which offers faster response, 24x7 coverage, and comprehensive training for everyone.

**Standard Success Plan**
*Every customer gets easy access to support with the Standard Success Plan*

All of our customers receive this plan to ensure their systems are supported. Our Standard Success Plan, included with each license, provides:

- Online case submission
- Unlimited use of our "Getting Started" online course catalog
- Online assistance through knowledge articles and community resources
- Phone support during local business hours
- Standard 2-business-day query response

**Premier Success Plan**
*Fast and complete coverage with the Premier Success Plan*
This plan is the perfect mix of support and training. When you have support questions, we have the expert answers, any day, anytime. Our Salesforce-certified support reps are here to assist you so you can get answers or resolve issues quickly, and get back to work knowing you’re covered.

Whether you need end-user training in a particular Salesforce product, or need to educate your Salesforce administrators and developers, this is the plan for you. Access our complete library of more than 100 online courses to build expertise in Salesforce products, drive value, and maximize ROI. The Premier Success Plan includes:

- Unlimited access to our entire online course catalog
- 24x7 toll-free phone support
- Priority case queuing and routing
- Quick 2-hour response time
- An assigned support account rep*
- Force.com code troubleshooting
- Customizable end-user course templates
- Premier Success Review** to measure usage and trends

The Premier Success Plan is available for an additional fee when purchased with either Salesforce.com’s Professional or Enterprise editions. It is ideal for any size company, with or without administrators.

**Premier+ Success Plan**

Add administration expertise with the Premier+ Success Plan

Cover all of your bases with this plan: support, training, and administration. It’s what the + is all about. The Premier+ Success Plan gives you all the benefits of Premier, including a support rep assigned to your company*, priority case routing, 2-hour response time, 24x7 phone support, unlimited usage of our entire online course library, plus one very helpful addition: access to your own team of expert Salesforce administrators. This lets you focus on design and management while we support your configuration.

In addition to all the support and training benefits included in Premier Success Plans, with Premier+ you also receive:

- Access to our pool of Salesforce Certified Administrators who can configure and maintain your Salesforce edition
- Includes more than 100 administrative services
- Premier Success Review** to measure usage and trends

The Premier+ Success Plan is included with Salesforce.com’s Unlimited Edition, or available for purchase with the Professional and Enterprise Editions.

View more information on these options here: [http://www.salesforce.com/services-training/customer-support/#more](http://www.salesforce.com/services-training/customer-support/#more)

View a datasheet on these options here: [http://www.salesforce.com/assets/pdf/datasheets/DS_SuccessPlans.pdf](http://www.salesforce.com/assets/pdf/datasheets/DS_SuccessPlans.pdf)

10. Describes the content and delivery models offered for any training and education that is available

Salesforce users can choose from a rich portfolio of classroom-based and self-paced, online courses covering the Salesforce Clouds. All courses are designed by our subject matter experts and are delivered online with a Premier Success Plan or in the classroom by our Salesforce.com Certified Instructors.
Online Training with Premier Success Plans
For the widest reach and most flexible training options, use the online catalog available with Premier Success Plans. This catalog includes courses for every Salesforce user, including sales and service reps and managers, marketing managers, solution designers and administrators, and Force.com developers and Technical Architects. Because the catalog is self-paced and online, users can take training when they need to without additional scheduling or travel. All online training is tracked and Help & Training Portal Administrators can report on course progress and completion.

Customize the Most Popular Courses to Your Business Processes
Jump start your customized training development and delivery with Premier. As part of Premier, you have access to the materials Salesforce.com uses to create our most popular online courses. These course storyboards and demo scripts are available for you to download and customize to your business processes or include as part of a broader training program. And because the materials include scripts, you have the option to create new online courses or deliver this content in instructor-led workshops.

Classroom Training for Your Power Users
Salesforce.com offers instructor-led courses to accelerate the skills development of your “power” users, including Administrators, Force.com Developers, and Technical Architects. These courses are delivered by Salesforce.com Certified Instructors and provide an intensive training experience to develop expertise on Salesforce and Force.com. Instructor-led courses are delivered around the world at salesforce.com and Salesforce Partner facilities or can be brought to your location for a private training event. Courses available include:

- Administration Essentials for New Admins
- Administration Essentials for Experienced Admins
- Building Applications with Force.com and Visualforce
- Introduction to Object-Oriented Programming Using Apex
- Apex and Visualforce Controllers
- Force.com Integrations

For more information, review the instructor-led course catalog at www.salesforce.com/training.

Certification to Demonstrate Expertise
Demand for Salesforce experts is growing rapidly and companies are looking for proven professionals. Companies who use certified cloud specialists see smoother deployments and better use of Salesforce. Getting certified boosts enables your team to contribute even more to your organization's success. Whether you are a Salesforce Administrator, Force.com Developer, Implementation Expert, or Architect, earning a credential from salesforce.com demonstrates that you have the skills and confidence to take full advantage of Salesforce. Learn more about Salesforce.com certification at www.salesforce.com/certification.

11. Describes any audit features offered in the solution

Within the salesforce.com system, the creator and last updater, as well as timestamps, are recorded for every record. All logins, both successful and unsuccessful, are recorded for retrieval by the customer's organization administrator. Logoffs are not records, as they cannot be determined in a web architecture.

The setup audit trail history helps you track the recent setup changes that you and other administrators have made to your organization. This can be especially useful in organizations with multiple administrators.

The setup audit trail history tracks the following types of changes:

- Company information changes
- Weekly data export requests
- Multiple currency setup changes
• User, role, and profile changes
• Public groups, organization-wide sharing, and sharing rule changes
• Password policy changes
• Mass delete, mass transfer, and import wizard use
• Company message changes
• Page layout changes
• Field-level security changes
• Changes to lead settings, lead assignment rules, and lead queues
• Changes to support settings, business hours, case assignment and escalation rules, and case queues
• Any changes made by salesforce.com Customer Support at your request
• Any tabs that you have renamed including tabs that you reset to the original tab name

12. Describes the documentation offered with the solution; include user and technical documentation

Salesforce.com provides a robust help and training portal which brings together a rich set of resources that
would give your organization a centralized way to help solve problems quickly and easily. We also provide
context sensitive help icons throughout our application screens to make it easier for users to get unique help
without searching. It is notable that we don’t provide large, offline help manuals but rather, all our help is
online so we assure that help is extremely thorough and effective for usability.

The Help site:
* Is Fully Customizable: You can personalize Help to meet your specific needs, customizing the gadget
layout to show what is important to you
* Allows Users to Get the Right Answers, Fast: Knowledgebase is more intelligent and comprehensive than
ever (Auto Suggestion of Search Terms, Expanded Knowledge Repository [Help Docs, Solutions, FAQs,
Training, Best Practices], and Refinement by Dimension)
* Chat: New engagement Channel gives customers the ability to chat with salesforce.com Support in real
time!
* Has Easy Case Management: Opening and reviewing cases is easier than ever
* Makes your administrator's life easier. Administrators gain insight with enhanced reporting on cases and
organization information.

13. Describes the frequency, method and delivery options offered for incorporating updates to the
solution

Salesforce.com typically provides 3 major upgrades each year. Each release is packed with a significant
number of new features. Salesforce continues to invest heavily in CRM, application usability, and platform
capabilities. New functionality introduced in each of these releases is immediately available to all users of the
system in an 'opt in' fashion, so as not to disrupt existing users not wishing to take advantage of new features
or capabilities. All individual customer customizations are preserved 100 percent with each upgrade.

You may view the features from our last release (Summer '12)

Salesforce.com communicates these to customers via webinars, email and via our website:
http://www.salesforce.com/customer-resources/releases/
Salesforce has a wide array of mechanisms to ensure that your personnel are aware of new functionality that
is being delivered, via our 3 releases per year. These channels target various user communities with the right
level of information that meets their needs. The effectiveness of the channel depends on your team's point of
view and needs.

Administrators are added by default to all communications that are initiated from a systems point of view.
These communications typically give the administrator insight into future releases, network outages, and
planned maintenance windows.

This information is also available from our Trust.Salesforce.com website, and on the new features area of our website: http://www.salesforce.com/customer-resources/releases/

**Technical Release Notes:**
Detailed release notes are provided via the DeveloperForce website.
http://Developer.force.com/releases/release

**Customer Community**
Salesforce has a large community of active users. Through online communities such as www.salesforce.com/community, live user groups throughout the world, and global user conferences, the salesforce.com community is able to actively share best practices and ensure everyone’s success.

**Annual User Conference:**
Each fall salesforce.com holds its annual user conference, the Dreamforce Global Gathering, in San Francisco. This is a four-day conference, with keynote presentations and educational offerings. Community activities include networking receptions, "birds of a feather" discussions, user group reunions, and a day-long activity in support of the salesforce.com Foundation.

14. Describes all support options available for your solution; highlight insourced, hosted, SaaS options

Salesforce.com does not require customer infrastructure to run on. Salesforce.com and Force.com applications are delivered on-demand over the Internet, so you need not worry about licensing software and setting up and managing hardware platforms, operating systems, or database (RDBMS) systems.

Vendor information should include:

1. Company overview

**Salesforce.com Foundation**

The Salesforce.com Foundation is the Salesforce.com associated non-profit foundation started in 1999 that covers all issues related to local community engagement and servicing the higher education and nonprofit markets. It is based on the simple idea to donate 1% of Salesforce.com's resources to support organizations that are working to make our world a better place. We call our integrated philanthropic approach the 1/1/1 model: We take a small fraction of Salesforce.com’s time, product and equity and use it to make a huge impact in the world. The ultimate goal: to disseminate the financial, technological and intellectual wealth of the organization to those in our communities who need it most. For more information, visit www.salesforce.com/foundation.

Since its founding, the Salesforce.com Foundation has pioneered an integrated philanthropy model, a model that weaves Salesforce.com’s philanthropic efforts into the very core of its success—its people, products, and profits—to help advance solutions to social and environmental problems.

In March of 2009, the Foundation began an innovative new stage in the evolution of our model when we became a reseller of salesforce.com products. Beyond the initial product donation to nonprofit and higher education institutions, the Foundation now also provides deep discounts on additional salesforce.com products, and 100% of the revenue from those additional sales returns to the Foundation to sustain and grow all of our charitable programs.

With this change, the Salesforce.com Foundation has become what we like to call a "social" social enterprise—an organization with a sustainable business model, driven by a social change mission, with community engagement for social good at its core.
Salesforce.com

Salesforce.com is a leading provider of enterprise cloud computing applications. We provide a comprehensive customer and collaboration relationship management, or CRM, service to businesses of all sizes and industries worldwide and we provide a technology platform for customers and developers to build and run business applications.

We were incorporated in Delaware in February 1999, and founded on the simple concept of delivering enterprise business applications via the Internet or “cloud.” Cloud computing refers to the use of Internet-based computing, storage and connectivity technology for a variety of different services. We introduced our first service in February 2000. Since then, we have augmented our CRM service with new editions and enhanced features. We introduced our Force.com platform to customers and developers so they can build complementary applications to extend beyond CRM. In 2010 we introduced our AppExchange directory of enterprise cloud computing applications that are integrated with our CRM service and in most cases have been developed on our platform by third parties. We also introduced Chatter, a collaboration application for the enterprise to connect and share information securely and in real-time.

Our principal executive offices are located in San Francisco, California and our principal website address is www.salesforce.com. Our office address is The Landmark @ One Market, Suite 300, San Francisco, California 94105.

We designed and developed our applications to be easy-to-use and intuitive solutions that can be deployed rapidly, customized easily and integrated with other software applications. We deliver our service through any of the market-leading Web browsers. Customers who use our CRM and collaboration services and platform are able to avoid much of the expense and complexity of traditional enterprise software development and implementations. As a result, our customers incur less risk and lower upfront costs and benefit from increased productivity.

We market our service to businesses on a subscription basis, primarily through our direct sales efforts and indirectly through partners. Through our force.com platform and developer tools and our AppExchange, we also encourage third parties to develop additional functionality and applications that run on our platform, but which are sold separately from, or in conjunction with, our CRM service.

Cloud Computing

Cloud computing fundamentally changes the way enterprise business software applications are developed and deployed. Application developers no longer need to create and manage their own infrastructure of servers, storage, network devices, operating system software and development tools in order to create a business application. Instead, the entire infrastructure is managed by third parties who specialize in infrastructure management, and developers simply use an Internet browser to access the development environment. Application users can gain access to a variety of business applications via an Internet browser or mobile device, and are able to take advantage of a robust, secure, scalable and highly available application, without the cost and complexity of managing the hardware or software infrastructure.

Our vision of enterprise cloud computing is based on a multi-tenant technology architecture and a subscription service business model. With multi-tenancy, multiple customers share application, platform and infrastructure services provided by the vendor.

Today, we believe that the next phase of cloud computing is transforming enterprise software again. Driven by the consumerization of information technology (“IT”), our next phase of cloud computing will have three key characteristics – it will be social, mobile and open. With the popularity of social networking websites, new ways to communicate and collaborate based on feeds and status updates have emerged. In the enterprise market, that means enabling employees to easily find, share and collaborate on information. In addition, with the wide adoption of mobile phones and tablets, our customers now expect cloud computing technologies to be built for business to work on these devices, regardless of the carrier or operating system. We are working to provide these new kinds of cloud computing technologies to enterprise customers around the world.
Cloud Applications

Cloud applications enable businesses to subscribe to a wide variety of application services that are developed specifically for, and delivered over, the Internet on an as-needed basis with few or no implementation services required and without the need to install and manage third-party software or hardware in-house.

Historically, only large businesses could afford to make investments in enterprise resource planning, CRM and collaboration applications to gain an enterprise-wide view of business information and automate and improve basic processes. However, cloud applications are available to businesses of all sizes and across all industries. Multi-tenant architectures enables cloud vendors like us to leverage a common infrastructure and software code base across all of our customers who benefit from access to the most current release of the application, periodic upgrades, more rapid innovation and the economies of a shared infrastructure.

We believe the shift to cloud applications provides significant benefits even beyond those associated with multi-tenant infrastructure. Businesses are able to realize many of the benefits offered by traditional enterprise software vendors, such as a comprehensive set of features and functionality and the ability to customize and integrate with other applications, while at the same time reducing the risks and lowering the total costs associated with owning enterprise software. As a result, we believe the continued emergence of cloud applications is bringing about a fundamental transformation in the enterprise software industry as businesses are offered the choice of replacing their purchased software with subscriptions to a wide range of application services.

Cloud Platforms

We believe that cloud applications and their related success in the market are the most widely understood segment of enterprise cloud computing. However, enterprise cloud computing also includes building applications on a cloud-based application development platform, also referred to as cloud platforms.

Application developers use cloud platform technology to build both custom applications for individual businesses or vertical industries, and horizontal applications to address standard business processes that can be sold to a broad range of potential customers. Application developers include corporate IT departments that typically develop applications for a company’s internal-use and independent software vendors (“ISVs”) that develop applications to sell to customers. Traditionally, these developers have needed to purchase, install, test and maintain complex software and hardware infrastructure to develop and deliver their applications. This requirement resulted in more time and resources being spent maintaining infrastructure and less time and resources being available to actually develop applications, with a resulting reduction in innovation and productivity levels.

Cloud platforms enable corporate IT developers and ISVs to leverage the benefits of a multi-tenant platform for developing new applications. Cloud platforms allow developers to build applications using only a browser and an Internet connection, just as cloud applications allow users to use applications through a browser. In addition, developers typically pay no upfront costs when building cloud applications, with costs only to be incurred at the point of application deployment.

Our cloud platforms provide application developers access to new capabilities that can be built into their business applications. These platforms include features popularized by social networking companies, such as profiles, status updates and feeds; and also the capability to extend applications for use on mobile devices.

Our cloud platforms allow both IT departments and ISV developers to use several programming languages to build their applications. While there are many benefits to a language natively associated with a cloud platform, developers are able to use the most popular programming languages on our cloud platforms, such as Java and...
Ruby, to build their applications. Our cloud platforms support multiple languages to provide developers openness and choice.

**Our Solution**

Our CRM applications help companies better record, track, manage, analyze and share information regarding sales, customer service and support, and marketing operations. In 2010 we introduced Salesforce Chatter, a private social network for businesses. Our Force.com cloud computing platform, which was introduced in 2007, allows customers and partners to more extensively customize and integrate our applications or build entirely new cloud applications beyond CRM without having to invest in new software, hardware and related infrastructure. These newly developed applications, which run on our infrastructure, can then be used for internal operations or sold to third parties.

We also offer the AppExchange, an online directory for cloud applications, where customers can browse, test-drive and deploy applications from salesforce.com and our partners.

The majority of our subscription and support revenue comes from subscriptions to our core CRM application and Force.com application development platform. In order for customers to install and run custom applications, whether built by themselves or by our partners, they must be a subscriber to our service.

By subscribing to our service, our customers do not have to make large and potentially risky upfront investments in software, hardware, implementation services and IT staff as they would with traditional software solutions. We believe that our service enables businesses to rapidly achieve the benefits of higher productivity, and lower their total cost of ownership for their business application.

2. **Size and composition of customer base**

Salesforce.com customers range in size from a small number of seats for emerging leaders to tens of thousands of seats for global industry leaders. Customer usage rates also vary by account partly due to the fact that our subscription based model better allows our customers to pay for only the number of seats they need for their specific business processes.

Overall our customers are comprised of the following:

- 1/3 are small businesses
- 1/3 are medium-sized businesses
- 1/3 are large enterprises

With more than 104,000 customers, salesforce.com leads the market in Cloud Computing with more customers and subscribers than any other software-as-a-service vendor.

3. **Plans for future product development/enhancements**

We are limited in the roadmap and product direction we can provide in print. More detail on our roadmap can be provided during a presentation at your location or during a visit to our Executive Briefing Center.

You may view information on previous and planned releases here: [http://www.salesforce.com/customer-resources/releases/](http://www.salesforce.com/customer-resources/releases/)
4. Normal/Potential timeline for major upgrades and/or update releases

Salesforce.com typically provides 3 major upgrades each year. Each release is packed with a significant number of new features. Salesforce continues to invest heavily in CRM, application usability, and platform capabilities. New functionality introduced in each of these releases is immediately available to all users of the system in an 'opt in' fashion, so as not to disrupt existing users not wishing to take advantage of new features or capabilities. All individual customer customizations are preserved 100 percent with each upgrade.

5. Hardware and System requirements

Salesforce.com only requires a computer that can run a web browser and an Internet connection. No other software or hardware is required

**Browser Compatibility**

- Windows Internet Explorer v. 7, 8 and 9. -- Salesforce.com strongly recommends using Internet Explorer version 9 over versions 7 and 8. Apply all Microsoft hotfixes. Internet Explorer 7 is not supported for Siteforce. The compatibility view feature in Internet Explorer 8 and 9 is not supported in Salesforce.
- Mozilla Firefox, most recent stable version -- Salesforce.com recommends using Firefox for best performance and makes every effort to test and support the most recent version.
- Google Chrome, most recent stable version -- Google Chrome applies updates automatically; Salesforce.com makes every effort to test and support the most recent version. There are no configuration recommendations for Chrome. Chrome is not supported for the Console tab or the Service Cloud console.
- Google Chrome Frame plug-in for Internet Explorer 6 -- Supported plug-in for Internet Explorer 6 only. Google Chrome Frame applies updates automatically; Salesforce.com supports only the most recent version. For configuration recommendations, see "Installing Google Chrome Frame for Internet Explorer" in the Salesforce online help. Chrome Frame plug-in is not supported for the Service Cloud console or Forecasts.
- Apple Safari version 5.1.x -- Supported on Windows XP and Mac OS X version 10.4 and later. There are no configuration recommendations for Safari. Safari is not supported for the Salesforce CRM Call Center CTI Toolkit or the Service Cloud Console.

6. General implementation timeline

- **Secure, scalable and reliable delivery platform.** The delivery platform for our service has been designed to provide our customers with high levels of performance, reliability, and security. We have built, and continue to invest in, a comprehensive security infrastructure, including firewalls, intrusion detection systems, and encryption for transmissions over the Internet, which we monitor and test on a regular basis. We built and maintain a multi-tenant application architecture that has been designed to enable our service to scale securely, reliably, and cost-effectively. Our multi-tenant application architecture maintains the integrity and separation of customer data while still permitting all customers to use the same application functionality simultaneously.

- **Rapid deployment.** Our service can be deployed rapidly. since our customers do not have to spend time procuring, installing or maintaining the servers, storage, networking equipment, security products, or other infrastructure hardware and software necessary to ensure a scalable and reliable service.

- **Ease of integration.** Our platform is designed to enable IT professionals to integrate our service with existing applications quickly and seamlessly. Our Force.com platform provides a set of application programming interfaces, or "APIs," that enable customers and independent developers to both integrate our service with existing third-party, custom, and legacy applications, and write their own application services that integrate with our service. For example, many of our customers use the Force.com API to move customer-related data from custom-developed and legacy applications into our service on a periodic basis, to provide greater visibility into
their activities. Other customers and partners have, for example, developed their own talent management solutions and procurement solutions on the Force.com platform.

- **Rapid development of applications using the Force.com platform.** Our customers and third party developers can develop applications rapidly, because of the ease of use and the benefits of a multi-tenant platform. We provide the capability for business users to easily customize our applications to suit their specific needs, and also powerful programming language support so developers can code complex applications spanning multiple business processes.

- **Increasing innovation.** By providing infrastructure and development environments on demand, we provide developers the opportunity to create new and innovative applications without having to invest in hardware and distribution. A developer with an idea for a new application can log onto our platform, develop, test and support their system on Force.com, and make the application accessible for a fee to our customers.

- **Lower total cost of ownership.** We enable customers to achieve significant up-front savings relative to the traditional enterprise software model. Customers benefit from the predictability of their future costs, since they pay for the service on a per subscriber basis for the term of the subscription contract. All upgrades are included in our service, so customers are not burdened or disrupted by the periodic need to perform system upgrades. Because we implement all upgrades on our servers, new features and functionality automatically become part of our service on the release date and therefore benefit all of our customers immediately.

- **High levels of user adoption.** We have designed our service to be intuitive and easy to use. Since our service contains many tools and features recognizable to users of popular websites such as those of Amazon, Facebook, Google and Twitter, it has a more familiar user interface than typical enterprise CRM applications. As a result, our users do not require substantial training on how to use and benefit from our service.

It is the responsibility of the customer to configure the software. Salesforce provides the service. In general, customers generally work with a certified Salesforce partner to aid in the configuration or conduct the configuration themselves.

7. Examples of previous implementations

- Burberry
- NBCUniversal
- Yamaha
- Avon
- Kimberly Clark
- GE Capital
- American Red Cross
- Comcast
- Asics
- KLM Royal Dutch Airlines
- Wells Fargo Bank

For more information, please visit our customer success site at: [http://www.salesforce.com/customers/](http://www.salesforce.com/customers/)

8. Examples of previous implementations in a higher education environment

- Northeastern University
- Kellogg School of Management, Northwestern University
- Fresno Pacific
NYU Wagner
Wayne State University
University of Minnesota

Additional details can be found here: http://www.salesforcefoundation.org/higheredstories

2.3 What Specific Information do you require from the University in order to provide your most favorable pricing?

The University offers interested suppliers the opportunity to express what information you require from us in order to provide your best pricing to the University. Describe if you offer volume discounts if additional University partners are included in subsequent purchases.

To be eligible to apply for the Salesforce.com Foundation Power of Us program, your organization must be recognized as a charitable, nonprofit, or nongovernmental organization in the country where you are located.

Private nonprofit and public higher education institutions qualify for our product donation and discount programs. We donate 10 non-transferrable licenses per university system. Additional licenses can be purchased at our deeply discounted rates. Proof of status: Higher education institutions will need to provide a link to their registration on www.nces.ed.gov during the application process.