



The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at wvOASIS.gov. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at WVPurchasing.gov with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Header @ 6

General Information | Contact | Default Values | Discount | Document Information | Clarification Request

Procurement Folder: 1553835	SO Doc Code: CRFQ
Procurement Type: Central Master Agreement	SO Dept: 0705
Vendor ID: VS0000047411 <input type="button" value="Go"/>	SO Doc ID: LOT2500000002
Legal Name: Process Panda LLC	Published Date: 12/17/24
Alias/DBA:	Close Date: 1/9/25
Total Bid: \$59,299.50	Close Time: 13:30
Response Date: 01/08/2025 <input type="button" value="Calendar"/>	Status: Closed
Response Time: 13:46	Solicitation Description: IT Service Management (ITSM) Platform Solution <input type="button" value="Go"/>
Responded By User ID: processpanda <input type="button" value="Go"/>	Total of Header Attachments: 6
First Name: Sam	Total of All Attachments: 6
Last Name: Matthews	
Email: sam.matthews@processpank	
Phone: 9172735752	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	IT Service Management (ITSM) Platform Solution	12.00000	MO	2025.000000	24300.00

Comm Code	Manufacturer	Specification	Model #
81162000			

Commodity Line Comments: 30 x HaloITSM Named Agent licenses, priced at \$810 per named license per year
 Paid annually in advance
 All pricing ex-Tax and in \$USD

Extended Description:
 See Specifications and Exhibit A - Pricing Page for Details

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Implementation & Professional Services Support and Maintenanc	150.00000	HOUR	233.330000	34999.50

Comm Code	Manufacturer	Specification	Model #
81112200			

Commodity Line Comments: 20 x Time and Materials Professional Services Consulting Days (150 Hours)
 Priced at \$1,750 per day, or \$233.33 per hour based on a 7.5 hour day.

Extended Description:
 See Specifications and Exhibit A - Pricing Page for Details

EXHIBIT A – Pricing Page

Section	Description	Unit of Measure	Quantity	Unit Cost	Extended Cost
4.1.1	Contract Item #1: Commercial off-the-shelf (COTS) configurable IT Service Management (ITSM) platform	Month	12	2025.00	\$ 24,300.00
4.1.2	Contract Item #2: Implementation & Professional Services Support and Maintenance	Hour	150	233.33	\$ 34,999.50
				Overall Total Cost	\$ 59,299.50

Please note: This information is being captured for auditing purposes.
Any product or service not on the Agency provided Pricing Page will not be allowable. The state cannot accept alternate pricing pages, failure to use Exhibit-A Price Page or a No-Bid could lead to disqualification of vendors bid.
The Pricing Page contains a list of the Contract Services and estimated purchase volume. The estimated purchase volume for each item represents the approximate volume of anticipated purchases only. No future use of the Contract or any individual item is guaranteed or implied.
Vendor should type or electronically enter the information into the Pricing Page to prevent errors in the evaluation.

BIDDER /VENDOR INFORMATION:

Vendor Name:	Process Panda LLC
Address:	111 South Moody Avenue
City, St. Zip:	Tampa, FL 33609
Phone No.:	(917) 273 5752
Email Address:	sam.matthews@processpanda.com



Vendor Signature:

8-Jan-25

Date:



Certification is conditional on maintaining the required performance standards throughout the certified period of registration
The British Assessment Bureau, 30 Tower View, Kings Hill, Kent, ME19 4UY

The management system of Certificate Number **223391**
Halo Service Solutions Ltd
Beverly House, 2 Market Place, Stowmarket, IP14 1DP

has been assessed and certified as meeting the requirements of

ISO 27001:2013

for the following activities

The design, development and provision of cloud based service desk services from the UK for the delivery of IT Service Management and Professional Services Automation on a global basis.

This is in accordance with the Statement of Applicability **issue 4 dated 15/04/2022**.

Further clarifications regarding the scope of this certificate and the applicability of requirements may be obtained by consulting the certifier.



8289



Valid from
Initial Certification: 31 July 2019
Latest Issue: 26 July 2023
Expiry Date: 30 July 2025
subject to annual assessments

Authorised by

A handwritten signature in black ink, appearing to read 'Mike Tims'.

Mike Tims
Chief Executive Officer

www.british-assessment.co.uk

Certificate issued by Amtivo Group Limited, trading as British Assessment Bureau

The validity and status of this certificate can be verified by using the UKAS CertCheck website at certcheck.ukas.com



WEST VIRGINIA LOTTERIES

ARFQ 0705 LOT2500000002 ITSM Platform Solution

Due Date: 9 January 2025



Submitted By:

Sam Matthews

Regional Sales Manager

sam.matthews@processpanda.com

917-273-5752

Process Panda

111 S Moody Ave, Tampa FL 33602

www.processpanda.com

Dear West Virginia Lotteries Team,

Thank you for allowing us to be part of your RFP process to optimize business operations pertaining to an ESM platform. At Process Panda, we are very selective about the many RFP's we are invited to participate in, always looking for the right "fit" between the prospective client's needs and what our organization provides. Our promise to those that we do business with is that Process Panda will not just be the right choice, but that we will continue to be the kind of Partner that works to earn your business every day.

CORE VALUES:

- We ARE: Passionate, Positive & Professional
- We STRIVE for: Successful customers, not simply "happy" ones
- We CARE about: Each other, our Customers and our Community
- We DELIVER: Results, not just activity

MISSION STATEMENT: At Process Panda our mission is to provide superior IT Service Management solutions and innovation while ensuring customer success.

As a global leader in IT Service Management, and the **2022 HaloITSM Global Partner of the Year**, the Process Panda team operates under these core values and mission statement, delivering true solutions to more than 400+ customers across all industries, geographies and markets. In 2024, Gartner specifically calls out HaloITSM as a top choice for enterprises trying to expand and improve on their overall Infrastructure and Operations maturity.

For IT organizations that struggle to deliver the efficient, comprehensive, and elegant end user services that today's enterprises require, HaloITSM is a service management platform that automates and personalizes service delivery for employees and IT staff — without a line of code! With Process Panda assisting, organizations:

- Radically improve the service experience
- Dramatically simplify and accelerate service creation and management
- Reduce and control the total cost of service delivery

Having deployed hundreds of ITSM systems within county government organizations extremely similar to West Virginia Lotteries, we have a very clear understanding of your challenges and requirements and have a commitment to the provision of services as documented in your RFP.

Again, thank you for this opportunity. Our team looks forward to engaging with you during this evaluation and learning more about your underlying goals and objectives.

Sincerely,



Gary Mellott - Executive Director

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Executive Summary

The West Virginia Lottery is a state-operated organization established to generate revenue for public programs through the sale of lottery tickets and gaming options. Founded in 1986, it offers various products, including traditional draw games, instant scratch-off tickets, and video lottery terminals. The Lottery aims to promote responsible gaming while providing funds for education, infrastructure, and other essential state services. By adhering to strict regulations and implementing consumer protection measures, the West Virginia Lottery seeks to enhance the state's economy while ensuring a fair and entertaining gaming experience for its players.

The West Virginia Lottery (WVL) is seeking bids for a commercial off-the-shelf (COTS) IT Service Management (ITSM) platform that can be tailored for various business needs, particularly for ticketing purposes. This solution should be delivered as Software as a Service (SaaS) and must feature ready-to-use connectors for Entra-ID, Azure Intune, and Azure DevOps. Additionally, it should include an IT Asset Management module to effectively manage the lifecycle of both hardware and software assets.

The ideal ITSM platform should enhance and integrate with the existing investments made in the Microsoft Power Platform and its ecosystem. Currently, WVL operates an on-premise ITSM system, but it is important to note that no workflows and knowledge base migration will be involved in this project. The focus is on implementing a solution that can seamlessly adapt to the organization's evolving needs.

By adopting HaloITSM through Process Panda, West Virginia Lotteries will leverage a true Enterprise Service Management platform that will not only address their immediate needs within IT, but as a future-proof solution, will position the organization well to meet evolving challenges and use-cases across the entire organization.

Process Panda's history, expertise, and crafted methodology in guiding clients through this journey will position West Virginia Lotteries well to ensure the solution meets their desired outcome and is well adopted. The intuitive and no-code nature of Halo will minimize the resources required to drive the solution long term, in turn reducing the overall total cost of ownership, and increasing the return on investment. Halo is designed to be self-driven, allowing customers to act with autonomy and without relying on third parties. Furthermore, a shift to Halo will create a more agile service delivery experience, empowering agents to respond faster and with greater confidence. In the same vein, it will allow West Virginia Lotteries team to iterate and innovate faster, with the ability to instantly make changes to your offering from within the UI, and create new services, forms and offerings rapidly.

The Halo platform is incredibly comprehensive and usable from day one, minimizing the cost of change significantly. Training and transfer of knowledge are core focuses for our implementation methodology to ensure the cost of change is minimal, with an opportunity for West Virginia Lotteries to shadow our project team throughout the process to extend the period of knowledge transfer and leverage our team's understanding of proper Halo governance and best practice. However, the Halo application, particularly the admin console is very intuitive and easy to interpret and has been designed with simplicity in mind so that heavy technical resources aren't required. Further to this, West Virginia Lotteries will be able to leverage the Process Panda and Halo community and collaborate and share ideas with other leading and innovative teams across the public and private sector.

Introduction

Process Panda

At Process Panda, we recognize that people, process, and technology are all necessary for organizational transformation and management. However, to achieve organizational efficiency, organizations must balance all three to provide actionable outcomes.

So, we make magic happen by creating cutting-edge solutions focusing on understanding your people, using our experience to align your processes and wrap it around one of the most powerful and flexible ITSM solutions in the marketplace, HaloITSM.

As the preferred Halo partner in both North America and Asia Pacific, and the **2022 Halo Global Partner of the Year**, Process Panda provides product licensing, advisory services, implementation services, process consulting, training services, and we locally support our solutions here in Colorado.



Together, Process Panda and HALO have built a proven track record of delivering transformational Enterprise Service Management solutions that have helped innovative and market-leading organizations solve an array of complex business problems. Our customers span across every industry including Government, Education, Retail, Managed Services, Health, Utilities, Non-profits, and many more.

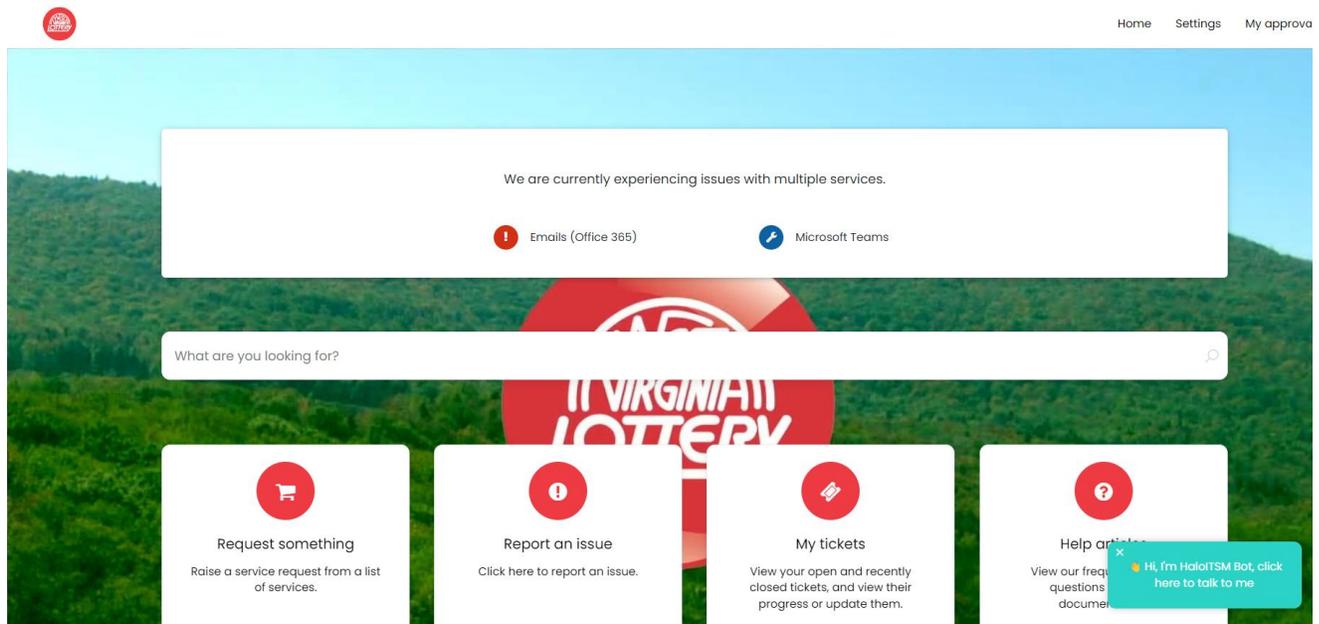
Why HaloITSM?

HaloITSM (formerly Net Help Desk) was founded in 1998 in the United Kingdom and has since grown to be one of the largest ITSM vendors in the marketplace. Over 150,000+ people, from 75+ countries, trust HaloITSM to deliver their Service Management capability.

The HaloITSM platform is an award-winning Service Management solution recognized by various analyst bodies, such as Gartner, Forrester and GetApp. HaloITSM is a powerful, flexible service management platform that enables Service Management teams to implement, automate, and modernize service and support processes to meet new and evolving needs— at a fraction of the cost and complexity associated with legacy Service Management tools.

Invest in Your Own

Process Panda will provide all necessary training required to “drive” the HaloITSM platform, which means West Virginia Lotteries can keep all configuration work internal without relying on the vendor or a third party integrator, which adds expense to the Total Cost of Ownership (TCO). Process Panda appreciates that some organizations do not have the bandwidth or budget and have options to provide resourcing and expertise if required.



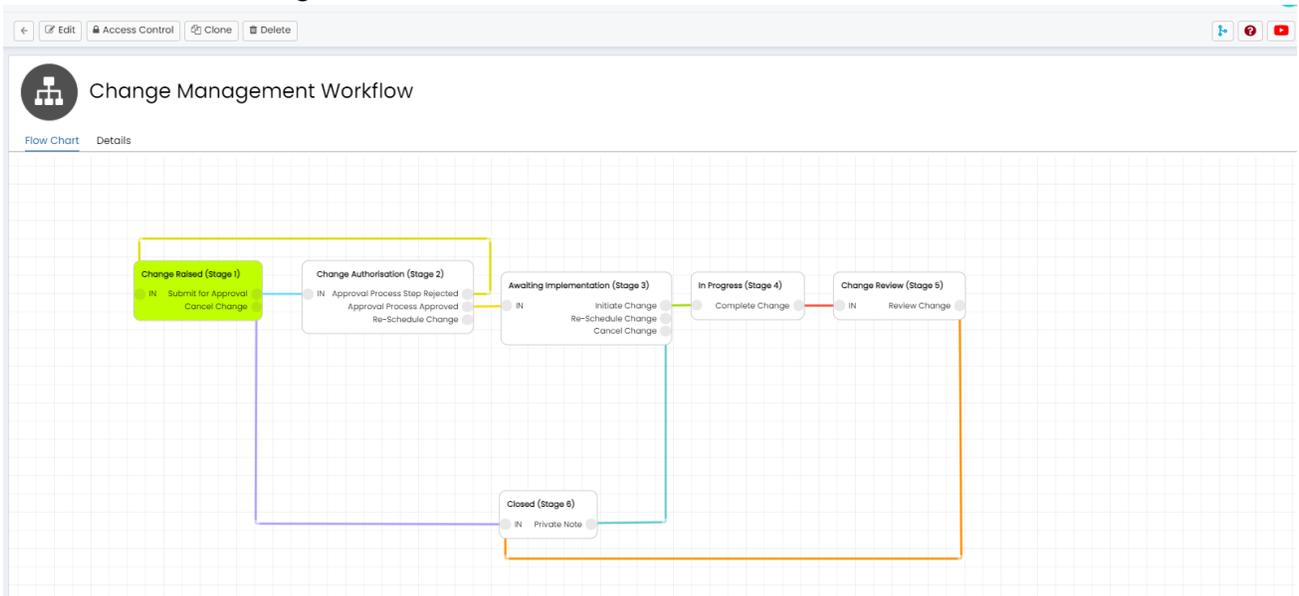
All-Inclusive License

Halo offers what we believe to be the most cost effective and transparent license model in the industry, with no additional charges for third party integrations, additional tenants, modules (including pre-built HR and Facilities service catalogues), actioning approvals, orchestrations, reports, dashboards, additional portals and more. This will not only give West Virginia Lotteries greater flexibility; it will also

provide them with a future-proof solution, and an upfront total cost of ownership which doesn't constantly command further investment as the tool is scaled.

No Code Experience

Given that HaloITSM is a no-code solution, there is no need to have any pre-existing knowledge of coding languages, such as JavaScript, SQL, C# etc, therefore there is significantly less time and resources involved in personalizing and expanding the platform post-go live. The reality of business is that things change – often, and having an agile tool that can be customized and configured at speed will allow you to meet these evolving needs.



The screenshot shows a 'New Starter Details' configuration window. The window has a title bar with 'Save', 'Access Control', and 'Delete' buttons. Below the title bar, there are tabs for 'Details', 'Defaults', 'Field List', 'Visibility Restrictions', and 'Other Uses'. The 'Field List' tab is selected, showing a list of fields:

- First Name (CFfirstName)
- Last Name (CFlastName)
- Employee ID (CFemployeeid)
- Starting Date (CFstartingDate)

Each field has an edit icon and a delete icon. At the bottom right, there is an 'Add +' button. At the bottom center, there are 'Save' and 'Cancel' buttons. The background shows a dark sidebar with various menu items like 'Configuration', 'Tickets', 'Ticket Types', 'Get started', 'New Ticket', 'Search', and 'Shared Drive (CFsharedDrive)'.

Powerful Artificial Intelligence

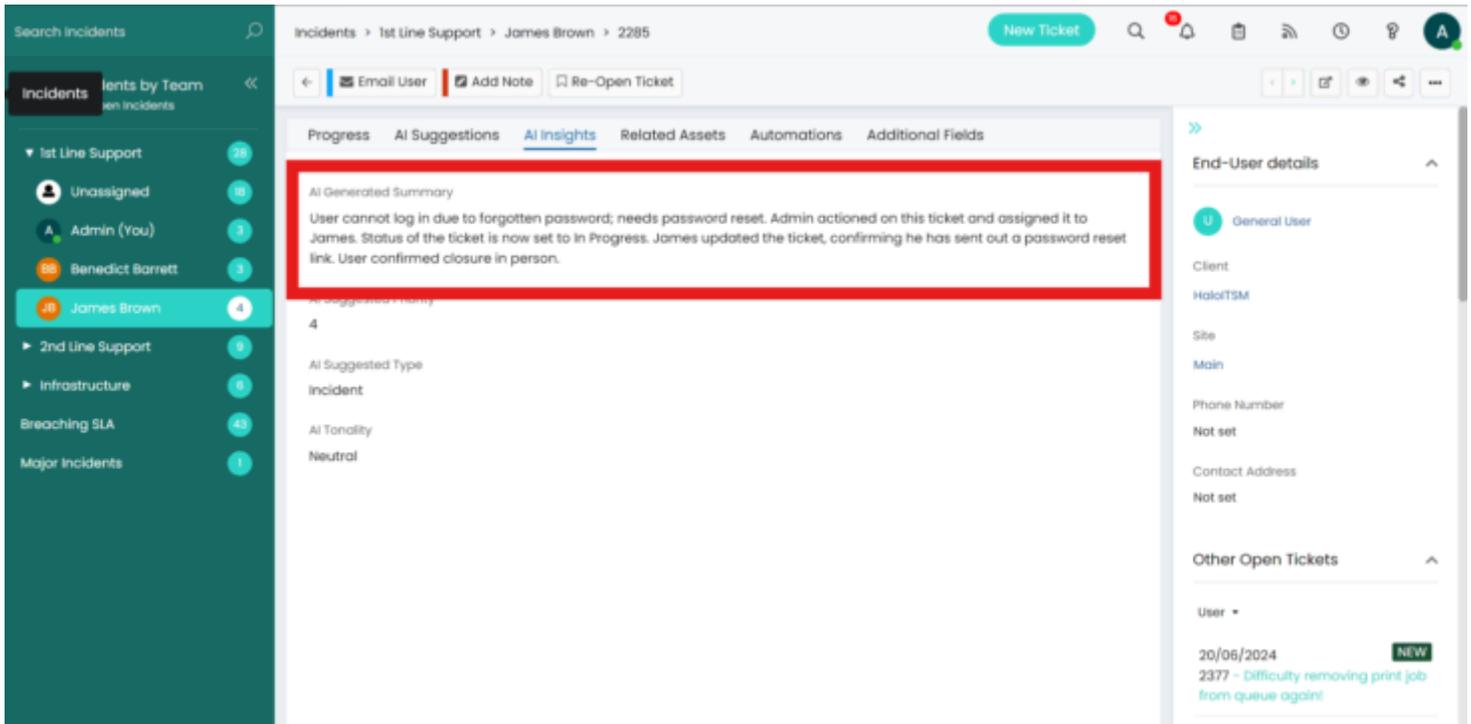
Take advantage of Halo's powerful Artificial Intelligence capability and experience the future of IT Service Management today. Automate your processes with AITSM and further improve your business. Whether it is summarizing a ticket for you, suggesting ticket types and priorities or effortlessly improving grammar and tonality in an email, creating insightful custom reports to satisfy the most unique need or even drafting amazing, engaging knowledge for your end-user community, Halo's native AI capability is designed to drive unparalleled operational efficiencies, both in providing service and administering the platform.

Case Clustering

Automatically group related tickets to streamline resolution. Utilize historical data to provide best-practice suggestions for resolving similar incidents or requests, enhancing overall service delivery efficiency

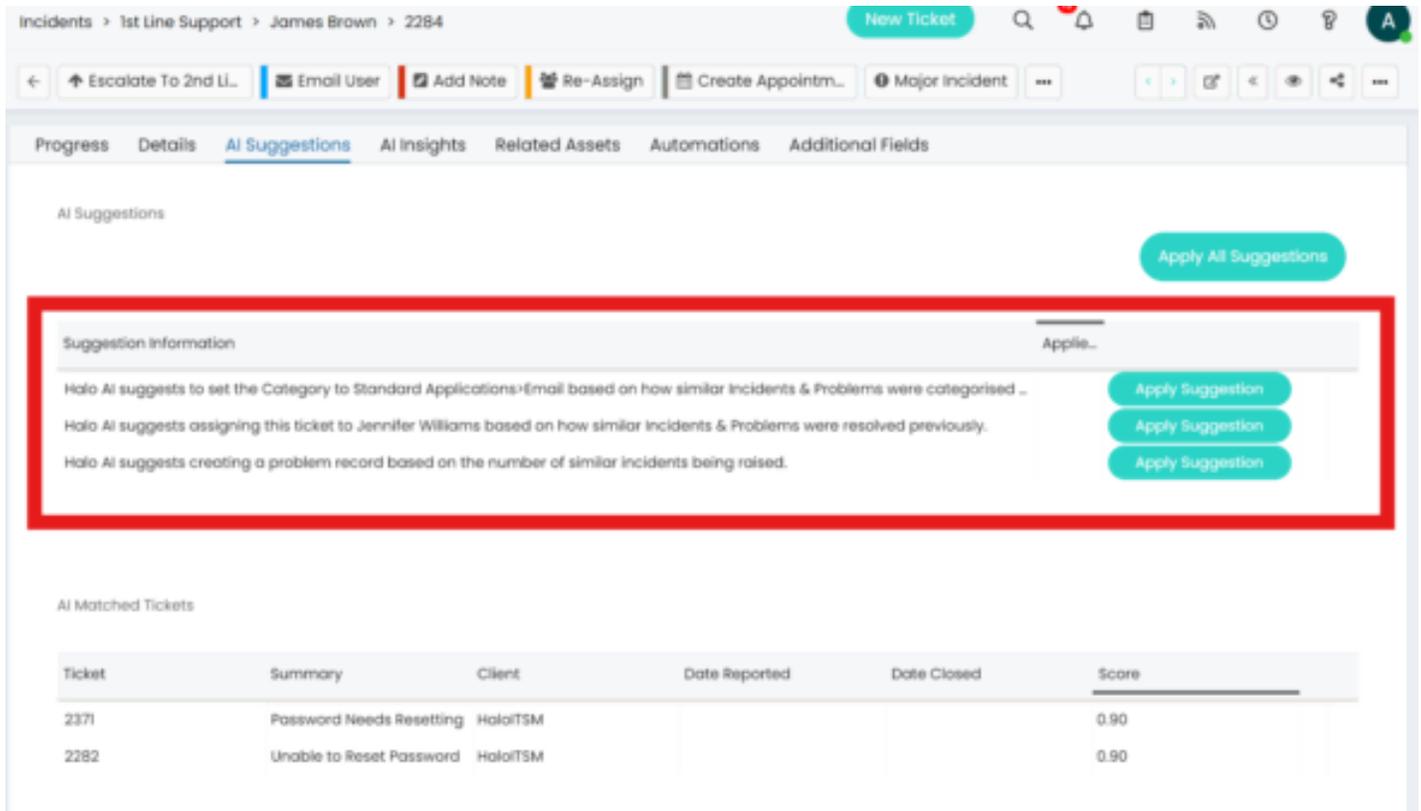
Case Summarization

Generate concise summaries of incidents to enhance comprehension and focus on resolution from the outset. Improve visibility and understanding across your IT Service Management (ITSM) operations.



AI Triage

Leverage sentiment analysis, historical data, and service impact to prioritize tickets accurately. Enhance the consistency and scalability of your ITSM platform by automating the determination of ticket urgency and importance.



The screenshot displays the 'AI Suggestions' tab for ticket 2284. A red box highlights the 'Suggestion Information' section, which lists three AI-generated suggestions, each with an 'Apply Suggestion' button. Below this, the 'AI Matched Tickets' section shows a table of related tickets.

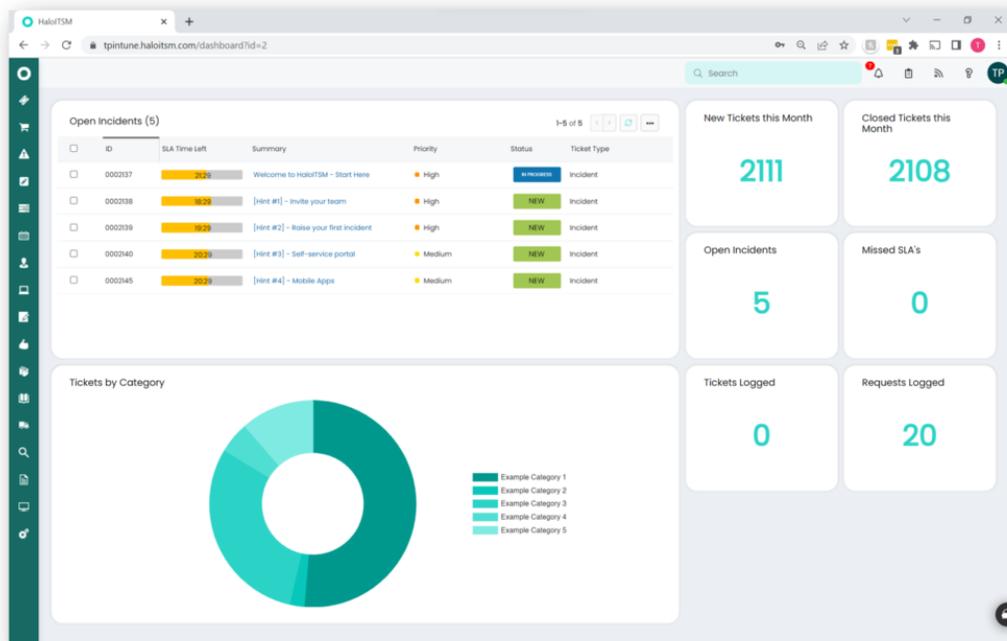
Ticket	Summary	Client	Date Reported	Date Closed	Score
2371	Password Needs Resetting	HaloTSM			0.90
2282	Unable to Reset Password	HaloTSM			0.90

AI Categorization

Automatically classify incidents by analyzing ticket patterns. Gain valuable insights into the nature of issues, enabling process improvements and ensuring tickets are routed to the appropriate specialists efficiently.

Clever Insights, Reporting and Dashboards

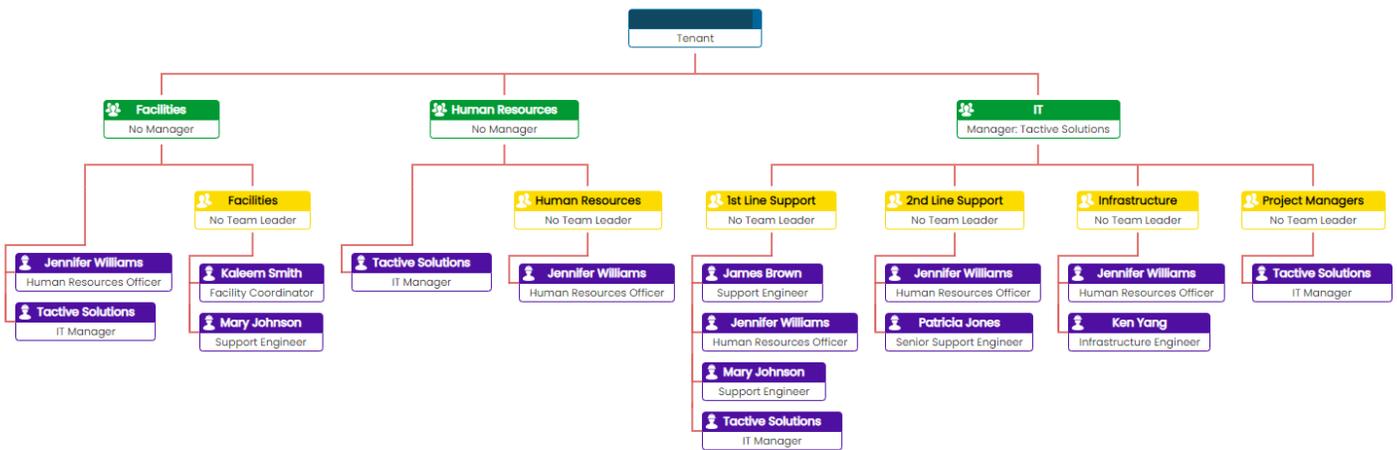
Halo offers powerful reporting out of the box to allow you to create, distribute and visualize reports that show what's happening within your environment without leaving the Halo platform. As standard, Halo has 150+ reports ready to provide insight on the core service desk and ITIL metrics, asset, change, incident and problem management, service availability, SLAs, and tickets. On top of this, Halo's online repository containing a further 900+ reports can be called upon to delve even deeper into your data. In-app query reporting allows you to create a consolidated view of the world within the Halo application. Simply drag and drop widgets containing your favorite report data, charts and counter metrics, activity feeds or features to see everything you need all in one place. Finally, save time on compiling management, change, or departmental-style reports with the ability to automate the creation of composite and paginated reports.



Enterprise Service Management

HaloITSM gives organizations the tools required to address service management challenges throughout the entire organization. Unlike other solutions, which require additional investment for each new capability, Halo provides IT, HR and Facilities functionality at no additional cost, which extends the ROI considerably. Customers can also scale the platform to include additional lines of business, for example Accounts Receivable, Procurement, Finance and Marketing without needing to invest in additional modules.

Details Departments Organisational Chart



Native Project Management

Collaboratively plan, manage, and track longer-term changes and projects seamlessly without leaving the Halo platform. utilize Gantt, Kanban and List views to organize your team and tasks, while tracking your time and budget all within the app.

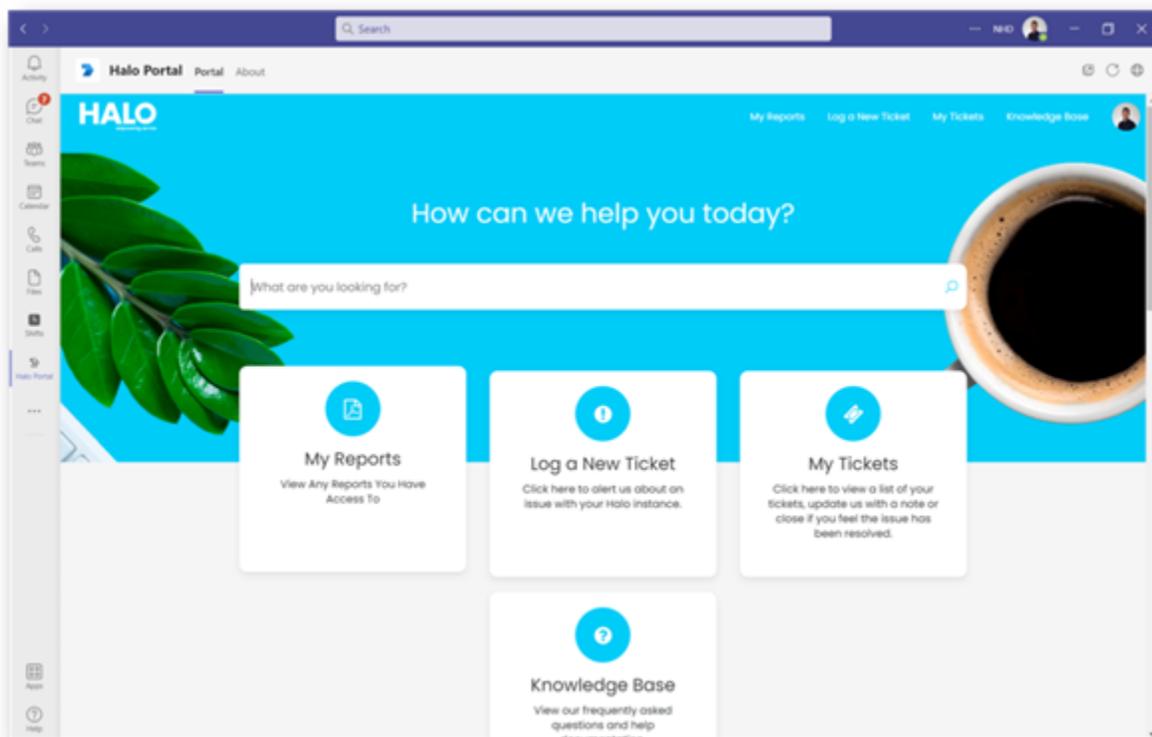
Integration with Microsoft Teams

With Halo's extensive Microsoft Teams integration, you can instantly turn updates, new items and changes from a specific item into messages in MS Teams so everyone will have the most up to date information and be able to work from both platforms and stay synchronized. You can also call users via Microsoft Teams directly from a ticket in HaloITSM – all you have to do is enable this feature by ticking the 'Call Management' box within Configuration > Integrations > Microsoft Teams.

Microsoft Teams Bot

In the 1-2-1 chat with the Halo MS Teams Bot, there are several commands that you can make use of with the Halo bot and general chats with colleagues/clients/teams, these include; following a ticket, unfollowing a ticket; and finding a ticket via the ticket number or search phrase.

Outside of the Teams Bot, you can create tickets from messages and add notes where necessary. In addition to that, you can search for tickets and send the relevant ticket details to whom you like, all directly in Teams. Finally, the entire self-service portal can be accessed from within the Teams app, minimizing the number of places your end-users need to look and helping to increase the adoption of self-service.



Other native integrations

Centralize your systems into a single application, with over 100 pre-built integrations, and a full, well-documented REST API. In line with modern expectations for pre-built, native and ready-to-use integrations rather than needing to invest time and resources in to developing your own, Halo allows you to leverage an ever-growing repository of integrations across an extensive variety of categories. An example of these is below.



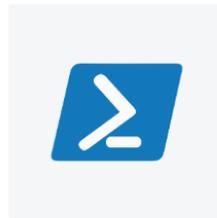
ChatGPT

Improve service delivery and operational efficiency by integrating HaloITSM with OpenAI's ChatGPT.



Azure DevOps

Integrate Azure DevOps with HaloITSM to increase collaboration between IT and product team.



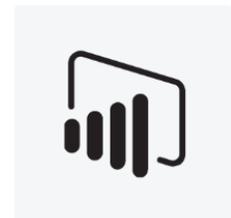
PowerShell

Integrate PowerShell with HaloITSM and run scripts based on system events.



Azure Automation

Automate your requests using Azure Automation within HaloITSM for services including mailbox creation, access granting and new users.



Power BI

HaloITSM feeds into your Power BI environment, enabling you to analyse your data using software that is already in use within your organisation.



Slack

Share information, updates and files in Slack #channels from directly inside HaloITSM.



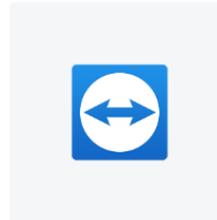
PagerDuty

Integrate PagerDuty with ITSM software to track incidents in one centralised location.



Intune

Integrate Intune for mobile device management (MDM) and mobile application management (MAM).



TeamViewer

Integrate TeamViewer with HaloITSM to connect remotely to assets and sites.



BeyondTrust

Integrate BeyondTrust with HaloITSM to connect remotely to assets and sites.

Testimonials



"We now have complete visibility over operations. This is saving us about 30 hours per week." – [ao.com](#)



"With our old tool a new service request form would take 6 weeks to implement. With HaloITSM it took 15 minutes." – [GFG Alliance](#)



"HaloITSM is modern, easy to use, brilliantly versatile, and allows a huge amount of automation." – [Suzuki](#)



**Ambitious
about Autism**

"We were struggling with tracking our work and tickets. It was hard to see what the teams were working on, and this was leading to errors. This is when we knew we needed Halo." - [Ambitious about Autism](#)



"Life was grey – service was not easy to deliver and customer experience was not optimal. Now life is Halo colourful – inject some colour into life and you will find your customers become reinvigorated and start using your services more." - [ACH Group](#)



"HaloITSM allows us to create, enhance and innovate our Customer's experience of IT Services and allows the customer to be in control. We can create seamless processes to give our customers a quick and easy resolution and provide a happy end to end service." – [Optivo](#)

Qualifications:

Vendor, or Vendor's staff if requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications submitted with their bid response:

3.1. Vendor must have 20+ years of experience developing solutions in the IT Asset Management and/or IT Service Management space.

3.2. Vendor must have 3+ years of experience developing IT Service Management solutions on the Microsoft Power Platform.

3.3. Vendor must have 3+ years of experience developing IT Asset Management solutions on the Microsoft Power Platform.

Process Panda was born with the purpose of delivering transformational and industry-shaping service management practices using market-leading technology, all whilst ensuring at our core we remain personable, reliable, and human. Your organization and its people are our focus and are why we do what we do; we want to understand your culture, vision, and how you deliver your service offerings to provide the best possible outcome. Leveraging decades of experience and a deep understanding of HaloITSM, Process Panda are well versed to transform your service management capability and deliver a best-in-class experience.

Process Panda was established by taking 30 years of experience in the service management space and aligning it with the most exciting and transformative ESM solution in the modern market, HaloITSM. Process Panda is a certified HaloITSM partner.

Geographically, Process Panda is a global practice with offices in Denver, Tampa, Brisbane, Melbourne and Sydney. Process Panda has been in business since 2021 in its current incarnation, however its founding team have been in this sector (including running similar businesses) for 30 years.

The vendor, Halo Service Solutions (HaloITSM) have extensive operations with offices in the US, UK, Australia, South Africa and Dubai and have been in business since 1995. Whilst maintaining a global presence, HaloITSM remain incredibly agile from a development and operational perspective. This allows them to deliver an enterprise-grade product, service and support whilst remaining flexible to iterate quickly and fulfil customers' requirements. This is why HaloITSM enjoys a 99% customer retention rate globally.

Globally, Process Panda has a proven track record of delivering solutions for county governments on time and within budget, and are a leader in doing so for the HaloITSM solution. Their expertise in seamless integrations and efficient delivery of the solution ensures that each project is tailored to meet the unique needs of local government clients. By combining their extensive experience with a focus on meeting the specific needs of each client, Process Panda consistently achieves outstanding results in local government, which is shown by the 5-10 successful projects delivered per year in state government alone.

Our experience with the Microsoft Power platform exceeds the expectation set by WV, with our platform even boasting a thorough native integration with the Power platform.

Proposed Team

The Process Panda team has been carefully crafted to balance expertise and accessibility, bringing together the best strategic thinkers and technical delivery experts to drive innovative, forward-thinking solutions for our global client base. Our focus on 'People' and 'Process', in addition to 'Technology' allows us to create long-term harmonious outcomes for our customers.

Gary Mellott – Executive Director (North America)

Experience: 33 Years

Gary is the Executive Director of Process Panda North America and brings decades of experience within the technology sector, specifically in service management. Previously Gary served as Director of Cherwell (now Ivanti) where he joined as the company's seventh employee working directly with some of the largest and most sophisticated technology teams on the planet, across both private and public sector. Whilst Gary's CV is extensive having directly been involved in hundreds of successful ITSM implementation projects, the most noteworthy include his work with Los Angeles County, the largest IT organization in the world at that time and the largest customer in Cherwell history, as well as Ancestry.com, FedEx, Anschutz Medical Campus, Texas State University System (all campuses), and Houston Methodist.

Sam Matthews – Regional Sales Manager (East)

Experience: 8 Years

Sam is an accomplished and results-oriented Sales Executive with over 8 years of experience specializing in serving a diverse range of sectors, with a particular focus on Education and Government. Sam is a founding member of Process Panda's now global team and has been directly involved in over 70 successful HaloITSM implementations, of which over 20 were with Government clients. Sam is solution focused with a proven track record in driving value through the Halo platform whilst building personable and long standing relationships. Sam possesses deep expertise in understanding the unique needs and challenges of a diverse range of sectors, and delivering tailored software solutions that enhance operational efficiency, compliance, and customer satisfaction. Skilled in leading cross-functional teams, negotiating complex contracts, and fostering long-term client partnerships, Sam excels in articulating technical concepts to non-technical stakeholders and leveraging market insights to drive ongoing value to his client's, guiding them towards innovation in service management.

Troy Ayuso – Senior Solutions Consultant

Experience – 22 Years

Troy Ayuso brings over two decades of expertise as an ITSM Solutions Expert, specializing in application and process design, defect management, business analysis, test coordination, deployment support, and project management. His extensive ITSM background enables him to drive significant business value through optimized processes and cutting-edge technical solutions.

Having collaborated with a diverse clientele, from Fortune 500 giants to innovative startups, Troy has garnered deep insights across various sectors including Government, Financial Services, Aerospace, Health Care, Gas Transportation, Commercial Software, Utilities, and Telecommunications. His

commitment lies in enhancing organizational efficiencies, implementing robust solutions, and maximizing the ROI on application platforms, ensuring sustained business success.

Like Gary, Troy also worked at Cherwell as a lead solution consultant, and has also worked client-side as a dedicated Cherwell specialist. Troy has also supported a number of other leading ITSM platforms, both on the vendor and client side, bringing strong a knowledgeable skillset and a deep understanding of what success in service management looks like.

Ollie King – Technical Resource (HaloITSM)

Experience: 4 Years

Ollie is a lead HaloITSM technical resource who provides global design leadership and guidance on the HaloITSM technology, as well as being a skilled technical skill primarily responsible for implementing the solution. Ollie's portfolio extends across federal, state and local government departments, tertiary education, and enterprise clients including the largest client in HaloITSM history. Whilst Ollie's technical ability is second to none, it is his soft skills and ability to lead clients towards a favorable outcome and through the transformation process that differentiates him from other consultants.

Mandatory Requirements:

4.1 Mandatory Contract Services Requirements and Deliverables: Contract Services must meet or exceed the mandatory requirements listed below.

4.1.1 Contract Services Deliverable # 1: Commercial off-the-shelf (COTS) configurable IT Service Management (ITSM) platform.

4.1.1.1 The solution must have the ability to be extended and configured to meet immediate and future needs for up to thirty (30) WV system administrators and end-users.

HaloITSM prides itself on being a scalable platform with the ability to be flexible and configurable to the needs of multiple departments within an organisation as an Enterprise Service Management system, and we have a number of large clients who are already using the platform in this way with thousands of agents, and tens of thousands of end-users within the organization.

The "Organization" module of the platform allows you to configure as many different departments and teams within the platform as possible, in addition to IT:

This can include the restriction and segregation of data between departments and teams, ensuring that agents within each department can also see data which is relevant to them and at their security level. Process Panda appreciate how important this can be for departments which deal with sensitive or secure data such as HR or Finance teams. Moreover, as the HaloITSM platform is so configurable, each department can have their ticket types and processes built into the system without impacting the processes of other departments.

4.1.1.2 Shall have ITIL-aligned ITSM and ITAM processes for Service Catalog Management, Incident Management, Problem Management, Change Management, Request Fulfillment, and Event Management.

HaloITSM is an ITIL-aligned system, pre-configured with robust ITIL processes. These processes include Incident Management, Service Request Management (and associated ITIL Service Catalog), Problem Management, and Change Management. Services can be monitored using the HaloITSM Event Management module. This allows for the tracking of the availability of a service using monitoring tools. When a "faulty" alert is detected for a particular service, this can automatically generate a high priority ticket, and simultaneously trigger a warning on your end-user portal to notify your end-users automatically of the fault. HaloITSM's event management module also automates the handling of alerts from third parties, automatically creating work items and managing service status.

4.1.1.3 Shall have an out-of-the-box integration to Microsoft Power Pages for a self-service portal.

Yes, HaloITSM has an out-of-the-box integration with Power Automate, allowing you to use Azure Power platform to create flows that interact with Halo, allowing the automation of certain processes,

and allowing processes to commence in Halo from a form submission from your Power Pages self-service portal.

4.1.1.4 Shall have an out-of-the-box integration to Azure Intune to discover and create configuration items for ITSM and ITAM.

Yes, HaloITSM has a native Intune integration which allows you to sync asset data, import software, map fields, and link assets to users. The Intune integration can be set up with a simple Azure AD application connection to pull data from Intune and map it to asset fields in HaloITSM platform.

4.1.1.5 Shall have an out-of-the-box integration to Azure Monitor to enable Event Management.

HaloITSM's Event Management module can easily tie in with your existing monitoring tools like Azure Monitor, enabling seamless tracking of service availability. When a "faulty" alert is detected for a particular service, it can automatically generate a high priority ticket and trigger a warning on the end-user portal to notify users of the fault. Additionally, HaloITSM automates the handling of alerts from third parties, creating work items and managing service status efficiently.

4.1.1.6 Shall have an out-of-the-box integration to Azure DevOps to create, track, and provide updates of work items related to ITSM.

Yes, HaloITSM has native Azure DevOps integration. The Azure DevOps integration with HaloITSM can help to increase collaboration between the service delivery and development teams, thus speeding up resolution times and visibility of data such as priorities across teams. Cross-functional collaboration helps teams understand the complete context of the business requirements. This removes collaboration bottlenecks and mitigates SLA issues.

4.1.1.7 Shall have an out-of-the-box integration to Microsoft Entra ID for creating and maintaining internal contacts in ITSM.

HaloITSM integrates with EntraID facilitating a seamless single sign-on (SSO) experience and maintaining agent and users in the platform. SSO can be configured for agents of the HaloITSM web-app, and for end-users on the self-service portal if desired (including approvers). The integration allows for the synchronization of user accounts and security groups, enabling rapid deployment of new users and administration of existing users within the system. This integration ensures that user management is centralized and streamlined, providing both easy access and enhanced security.

4.1.1.8 Workflows shall and can be created without code and visualized within Power Automate.

HaloITSM's workflow builder is entirely codeless, allowing administrators to create, build and test workflows using a intuitive drag and drop interface. These workflows can include automations, and can

utilize Halo's native integrations (such as Power Automate) to seamlessly collaborate across platforms through a workflow.

4.1.1.9 Shall leverage Power BI for business intelligence level reporting.

Yes, HaloITSM supports a native integration with PowerBI, allowing for ease of reporting on data collected from HaloITSM. Data can be pulled to PowerBI in a matter of clicks by publishing a Halo report to API (which is a simple option on each report), or via a direct SQL connection.

HaloITSM includes an ever growing repository of valuable, pre-built reports, providing deep insight into your data instantly. In addition to this, customers are entitled to full database level access to their platform, making the custom reporting capabilities endless. Custom reports can also be codeless, using the AI or dropdown select query builders.

4.1.1.10 The platform and self-service portal must conform to accessibility standards WCAG 2.1, US Section 508, and EN 301 549.

HaloITSM adheres to the accessibility standards delineated in WCAG 2.1AA.

4.1.1.11 The platform shall be ISO 27001-certified; certificates must be provided in the bid submission.

Yes, our organization is ISO 27001 certified. We will provide copies of our ISO 27001 certification reports in the bid submission.

4.1.1.12 The platform shall be ISO 27018-certified; certificates must be provided in the bid submission.

Yes, all data within HaloITSM is hosted with Amazon Web Services, who are ISO/IEC 27018:2019 certified.

<https://aws.amazon.com/compliance/iso-27018-faqs/>

4.1.1.13 Vendors must provide comprehensive documentation for up to thirty

Process Panda provides comprehensive and accessible user documentation and training materials for the HaloITSM platform. This includes comprehensive written and video guides, built-in Contextual Help throughout the product, Tutorials, Online Training Seminars, Agent Training, and Administrator Training as well as a Custom Handbook for WV Lotteries if this is desired. All documentation and training materials are provided in accessible electronic formats.

4.1.1.14 Vendors must describe the proposed solution in the response and detail how it meets or exceeds the mandatory requirements.

The proposed solution, HaloITSM, is designed to provide comprehensive Enterprise Service Management capabilities. It features a centralized self-service portal that manages all service requests efficiently and effectively. HaloITSM's powerful drag-and-drop workflow engine allows for the configuration and streamlining of complex processes, ensuring that each service area can tailor workflows to meet their unique requirements. It is fully ITIL-compliant, supporting a comprehensive range of service desk features that adhere to industry best practices, as well as industry shaping Artificial Intelligence that will position WV Lotteries at the forefront of service delivery for years to come. HaloITSM's user-friendly design, robust functionality, and flexibility set it apart from other service desk solutions. Finally, its suite of native integrations allows you to easily centralize all of your applications into one platform, providing a consolidated overview of your environment, without requiring any complex development.

Based on this, and our responses to your requirements, we are extremely confident that Halo exceeds your mandatory requirements. However, unlike other platforms, Halo will not require an army of developers or technical resources to drive the solution.

4.1.1.15 The Vendor must provide live online training for up to thirty (30) WV staff.

Process Panda provides comprehensive training for both users and technical staff. For users, we deliver agent training on how to use the system on a day-to-day basis and how to configure important time-saving features. For technical staff, we provide in-depth administrator training on advanced configuration and functionality. We also provide online training seminars, bespoke handbooks, integrated guides, and instructional videos. Training materials are continually updated and much of the help is integrated into the platform itself. Traditional training is typically delivered online, through Microsoft Teams, or the customers video conferencing platform of choice.

4.1.2 Contract Services Deliverable # 2: Implementation & Professional Services Support and Maintenance**4.1.2.1 Implementation & Professional Services Support and Maintenance must be available Monday through Friday, 8:00 a.m. EDT to 5:00**

The Process Panda team is available and responsive from 8 AM to 5 PM AEST, Monday through Friday for all inquiries and support needs relating to the initial implementation. Ongoing support is provided 24x7x365 from our local HaloITSM support team.

4.1.2.2 Vendors must detail the service level agreements (SLAs) and emergency support procedures, with their bid response.

At Process Panda, we offer a range of Service Level Agreement (SLA) options. Our target SLAs for Halo Support are as follows:

- Priority 1 (Critical): Response time within 0.5 hours, with a resolution time of 8 hours.

- Priority 2 (High): Response time within 1 hour, with a resolution time of 2 days.
- Priority 3 (Normal): Response time within 2 hours, with a resolution time of 4 days.
- Priority 4 (Low): Response time within 4 hours, with a resolution time of 6 days.

Our SLA applies within the hours of 8am-5pm AEST, within which the Support team operate, with the exception of P1 incidents which we offer 24x7 support for.

4.1.2.3 The Vendor must provide documentation with their bid response outlining ongoing maintenance and support requirements for the system.

Full platform maintenance is included in the provided license pricing at no additional cost. Standard maintenance occurs during the minor update cycle which typically occurs on a fortnightly basis. This occurs out of hours and is non-disruptive to the service. Every release goes through a strict QA procedure, which tests functionality, performance, configuration, user experience and stability. Only once it passes these tests is the version available for use.

Process Panda prides itself on the timeliness and effectiveness of its support, which is included within the proposed license pricing. Process Panda offers 24/7 HaloITSM support for all high priority issues through our in-house North American and Australian support teams. These can be accessed by phone, email and the self-service portal. All support is provided in English. After your implementation is complete, our support team become intimately familiar with any unique configuration in your system, allowing them to tailor their support to suit your organization's needs. As a result of our support, your team can have confidence that their service delivery will not compromise. Your team will also be supported as you continually expand your use of the tool and will be kept in the loop about updates or new features that may affect or benefit your environment.

Exhibit A: Pricing Page

The HaloITSM licensing model is all-inclusive, with all areas and capabilities included within the per-agent licensing cost. A HaloITSM license also includes cloud hosting with AWS, premium 24x7x365 support provided by Process Panda, and access to our gold customer- success program.

The core HaloITSM platform is licensed per 'agent', otherwise commonly known as an analyst, fulfiller or resolver. Within the Halo platform, there is no license required for accessing the self-service portal (end-user access) or actioning approvals. The HaloITSM license is based on the total number of agents that would be involved in managing "tickets" within the platform. The HaloITSM license is all-inclusive, offering what we believe to be the most cost effective and transparent license model in the marketplace, with no additional charges for accessing the self-service portal, 3rd party integrations, modules, additional business areas (e.g. Facilities and Human Resources), actioning approvals, orchestrations, reports, additional portals and more.

Please see Pricing Page attached alongside our submission as a separate electronic document.

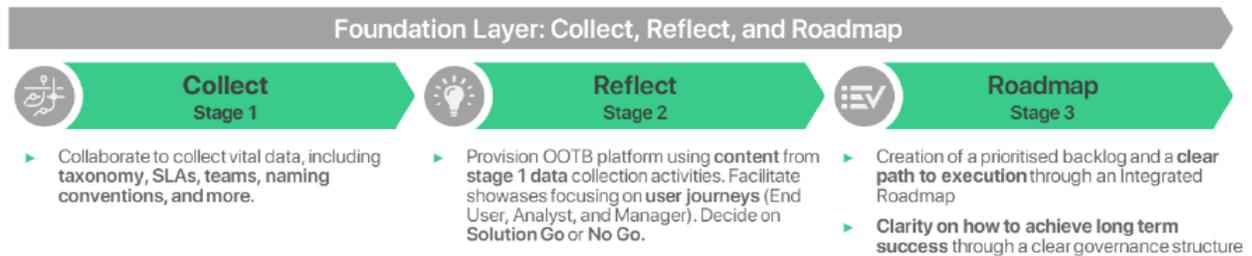
Exhibit B: Proposed Plan

Whilst not strictly requested in the Request documentation, we would like to highlight what the proposed HaloITSM implementation plan would look like, to give WVLC confidence in how the implementation will be managed, and how the business outcome will be achieved.

Implementation Plan

Implementation Methodology and Governance Structure

The diagram below outlines the recommended implementation methodology Process Panda follows when implementing HaloITSM for the very first time. This is focused across three (3) distinct stages to ensure West Virginia Lotteries is delivered a best practice ITSM solution personalized to their requirements, with a continued strategy and roadmap post go-live.



Implementation Methodology

Process Panda's approach to each project can often be different based on several elements, such as priority items, budget, timelines, and cultural nuances. However, Process Panda has created a recommended methodology when implementing a Service Management tool for the first time, which is outlined below.

Implementation Methodology

Process Panda recommends an approach that has two distinct phases, which provides accelerated solution onboarding, increased opportunity for knowledge transfer, and more effective planning to support optimal resource management. To ensure a successful implementation, Process Panda will require stakeholder engagement from West Virginia Lotteries. Our approach clearly articulates these collective resourcing needs to ensure that enough lead-time is baked into the schedule to make sure that we can deliver as agreed.

Process Panda can provide both local and remote project delivery services. Please note that a remote approach removes any potential local resourcing constraints that could impact timeframes and allows us to draw down on additional (remote) resources as and when needed to provide contingent effort if required. This approach also removes the management overhead of you having external resources on-site.

Process Panda Approach (High-Level)

When implementing a new Service Management tool, Process Panda proposes a collaborative approach, which spans over a series of detailed stages, working closely with your teams to deliver a successful and sustainable outcome.

Start Up:

Pre-Requisites:

- Kick-off Meeting/Pre-Requisites Check-in
- Data Collection Template

Phase 1 – Foundation Layer:

Discover

- Base solution provisioning, inclusive of technical elements
- Base solution personalization

Design & Define:

- SME orientation and familiarization
- Design workshops against requirements

Roadmap:

- Prioritize configuration activities
- Define governance structure for delivery on configuration activities

Phase 2 – Alignment:

Develop:

- Configuration activities based on user journeys (Portal, Forms, Dashboards, Reports, Emails, Knowledge, Surveys etc):

Deploy & Release:

- UAT and defect remediation
- Final PVT
- Go-Live
- Hype Care

Key stages of this approach are described in more detail below:

Project Kick-Off Meeting

The Project Kick-Off meeting is intended to provide the stakeholder group with a common understanding of the project deliverables, expected outcomes, risks, issues, timeframes, and on-going governance requirements. This is also the opportunity for pre-requisite needs to be discussed, and next steps agreed. Key agenda items will include:

- Delivery approach
- Solution expectations
- Project Schedule
- Business drivers (reason for change, dependencies, constraints etc.)
- Customer resource availability and demand expectations
- Pre-requisites
- Change Freeze periods
- Reporting Requirements

Base Solution Provisioning and Configuration

During this stage Process Panda will provision your solution, ensure that all pre-requisite needs have been met and configure the base, or 'Foundation' product. At the end of this stage you will be able to commence familiarization and learn more about your new platform.

Your solution will not be exposed without successfully passing through rigorous testing. Process Panda will undertake extensive testing as part of the delivery of each work package, the types of testing performed include:

- Unit Testing – the individual build components are tested to be deemed fit for purpose
- Integration Testing - the solution is tested to expose any faults in the interfaces and or interconnected systems.

SME Orientation and Familiarization

Once the base solution is ready Process Panda will schedule sessions with your key SMEs and stakeholders to walk them through the product. The objective of these sessions is to ensure that those who will be using and or championing the implementation and usage of the solution are familiar with how everything works, and have the exposure required to support business preparation and change management (e.g. end user training, communication, and on-boarding). This stage is also critical to ensure that those SMEs that will be using the system are equipped to be able to execute User Acceptance Testing (UAT).

Showcase and Familiarization

Once the base solution is ready Process Panda will schedule sessions with your key SMEs and stakeholders to walk them through the product. The objective of these sessions is to ensure that those who will be using and or championing the implementation and usage of the solution are familiar with how everything works, and have the exposure required to support business preparation and change management (e.g. end user training, communication, and on-boarding). This stage is also critical to

ensure that those SMEs that will be using the system are equipped to be able to execute User Acceptance Testing (UAT).

Final Checks/Remediation

During this stage Process Panda will address any in-scope defects discovered during UAT and prepare for production release

Transition to Support

The transition to support meeting is critical to ensure that you have been introduced to the Process Panda Support Team, we will confirm key contacts and provide you with a thorough introduction of what you can expect post implementation.

Go-Live and Hyper Care

Once your solution has been released to the business Process Panda will be on-hand to ensure that any issues, concerns, or questions are handled as quickly as possible via the Process Panda Service Desk.

Project Management Approach

Process Panda will collaborate with West Virginia Lotteries to determine which project management method is the most suitable for the engagement. If a traditional waterfall approach is chosen, Process Panda will ensure an appropriate linear schedule is developed, Alternatively, if an Agile approach is appropriate, Process Panda will assist West Virginia Lotteries in creating sprint plans and product backlogs to ensure that the project is appropriately managed.

The chosen approach will be finalized at the beginning of the engagement, to ensure it aligns with the County's desired model. Irrespective of the chosen approach, Process Panda will provide the following meetings and artefacts to West Virginia Lotteries to ensure that the project is well managed:

- A finalized project schedule with milestones and estimated completion dates.
- Weekly Status Reports detailing work completed and resource utilization.
- Frequent product demonstrations to ensure stakeholder sign off on key features is obtained.

Timeline

Process Panda's solution consulting team is exceptionally well-resourced and operates with a time-tested methodology that ensures efficient delivery of the HaloITSM solution. Leveraging the codeless and intuitive design of HaloITSM, our approach streamlines implementation, minimizing complexity and accelerating deployment. This combination of robust resources and proven processes enables the team to deliver tailored solutions to clients within a concise timeframe. Below is an indicative timeline for our Smart Start HaloITSM implementation, with the SmartStart package component being delivered first to establish a robust baseline before completing UAT, training, go-live and commencement of hyper-care.

Deliverable	Week	1-2	3	4	5	6	7	8-9	10-12
Discovery		█							
Design		█							
Build			█	█	█	█	█		
Core Setup			█						
Incident Management			█	█					
Request Management				█	█				
CMDB				█	█				
Problem Management						█			
Change Control						█			
Project Management						█			
Additional Features (workflow design)							█		
UAT							█	█	
Functional Review							█	█	
Training							█	█	
User and Admin Training							█	█	
Go Live								█	
Hypercare									█

Detail methods to be employed which will result in cost savings for the County. Give examples and where possible provide a realistic estimate cost savings.

There are many opportunities for tangible, measurable cost savings throughout the initial implementation (creating project cost savings), and through ongoing use and adoption of HaloITSM. Process Panda’s approach to the implementation and ongoing solution prioritizes measurement, so that we can ensure costs savings and efficiencies created throughout the engagement are quantifiable.

An example of how realistic cost savings have been achieved on similar engagements:

- Transitioning client to a codeless toolset, where administrators can quickly and easily configure the tool themselves with full self-sufficiency.
 - Tangible cost savings achieved through a reduction in third-party consulting costs, and in many cases a reduction in internal staffing costs, through not requiring dedicated developers or technical resources
- Utilizing automation within HaloTSM to automate clerical tasks (for e.g. , as well as automated triaging of tickets
 - Cost savings achieved through decreasing the time IT staff spend on repetitive tickets, and more efficient service delivery capability.
- Adoption of HaloTSM's Artificial Intelligence capabilities to streamline operations and service delivery.
 - Cost savings delivered through reduction in mean time to resolution, and less resources required due to more efficient ticket handling as a result of AI suggestions and AI resolutions.
- Enhanced reporting and analytics
 - Enables informed decision-making based on real-time data, leading to more effective budget management and cost control.
- Greater adoption of Self-Service through contemporary Self-Service Portal
 - Cuts down on the number of support requests and associated labor costs by providing users with tools and information to address their own issues.

Include any additional services or information seen beneficial to this program that the evaluation committee should consider.

Whilst not explicitly called for in the RFP documentation, we have shared some additional information about other important areas to consider when evaluating a project delivery partner, which we believe Process Panda excels in.

Quality Management

Process Panda's quality management guidelines define the systems, practices and belief system that governs our solution design and delivery day to day. These standards and practices are tightly upheld internally, with a strong culture promoting the adherence to our quality management approach, including holding one another accountable to these values.

Structurally, quality management is heavily built into our project approach and framework. Prior to the project commencing, an agreed approach and methodology will be discussed with the County during the kick-off meeting. We're comfortable adapting an approach that suits West Virginia Lotteries or leveraging our own.

From a quality management perspective, the close of every sprint or core stage will include a showcase where the work completed during the sprint is reviewed and signed off by the County. This will allow your project team and core business users to confirm the quality is as expected and fit for purpose. One final UAT sprint will be conducted to demonstrate the quality of the full end-to-end solution. The

frequent showcase of the implementation allows any potential risks to be mitigated, promotes frequent familiarization of the solution to your team during the project (which helps knowledge transfer) and improves project efficiency overall.

Irrespective of the project approach, peer review is an active element of our methodology to ensure the work completed is technically accurate as per best practice, and contextually aligned with West Virginia Lotteries's requirements.

Any remediation required during this stage is actioned and the review process is then repeated. Once all build activities are completed and ready for final UAT, a report will be presented outlining all tests completed with their respective results.

Approach to Testing

Testing is a key component of our development process. Regardless of the size or nature of works, testing at various stages is completed to not only ensure the development is functionally correct, but also meeting expectations and business requirements set. Process Panda will host regular sessions to demonstrate the work completed. This is to ensure any concerns or queries are addressed quickly, supporting our fail-fast philosophy.

High-Level Testing Approach:

1. Unit testing completed by consultant
2. Review completed by technical lead
3. Demonstration of work to customer
4. User Acceptance testing as and when required including one end to end UAT cycle
5. Production verification testing once released into production.

We are quite flexible when it comes to tracking these tests, associated defects and action plans. Should West Virginia Lotteries wish to leverage a particular product or approach to communicating these items, Process Panda is willing to be adaptive. Alternatively, our default approach is to store all items in a repository that can be accessed in a collaborative fashion.

Performance and security validation is included within our testing. All development within Halo is completed leveraging best practice approaches. This ensures systems are not likely to be degraded from a performance perspective and equally not prone to cybersecurity issues.

Training and Knowledge Transfer

Process Panda believes that the implementation process itself should be a learning process, ensuring that throughout every stage of configuration your HaloITSM administrators are being educated on how the platform works, its method of configuration as well as proper governance for ensuring long term success within the platform. In addition to 'shadow sessions' throughout the implementation itself, formal training is a core activity and focus of the implementation, with a minimum of a week of dedicated training time included for both administrators and agents.

Administrator training builds on the knowledge they will have gained throughout the implementation, leaving them with comprehensive knowledge of the whole solution. Depending on your preference your HaloITSM consultant can then either train your users directly or train a trainer ready for go-live. During this phase, your dedicated HaloITSM consultant will provide online training seminars for all

agents of the system, and will provide a bespoke handbook of information on HaloITSM and internal processes.

To complement our support system, professional services and implementation training, HaloITSM comes with an extensive directory of guides on using the platform. These contain pictures and diagrams making them easy to understand and implement. HaloITSM also has a dedicated YouTube channel of "How-To" videos, some of which are also integrated into the platform itself in key configuration areas, so links to guides and videos are always on-hand. Should you have any questions, however, our support team are always on hand to help.

Common Risks and Mitigation Strategies

The Process Panda Project Manager will work with West Virginia Lotteries to understand the context of your project, so that a suitable risk management plan can be defined, should it be required, prior to work commencing.

Depending on your governance and compliance needs we can adopt your project governance methodology for Status, Risk, and Issue reporting, and Change Management, alternatively you can work with the Process Panda Project Manager to establish a specific framework that suits the risk profile of the engagement.

There are a number of common risks that pertain to the delivery of a solution such as this, which through our experience on similar projects and our consultants' career experience are capable of being mitigated. However, with any risk mitigation strategy on a project of this nature, both the customer and consulting project manager must take ownership of the responsibility of risk management.

Potential Risks & Mitigation Strategies:

Lack of availability to customer SMEs and specific resources

Mitigation Strategies: Sufficient bandwidth should be created by the County's project team and any subject matter experts that may be involved. An example of these SMEs includes those from the infrastructure or security teams, or other lines of business the solution will support. During the kick-off meeting, the Process Panda project team will advise the County of SMEs that will be required and when so that any meetings or involvement can be scheduled well in advance to assure availability.

Capacity constraint, from both customer and consulting project teams which can lead to inability to action and make decisions

Mitigation Strategies: Similar to the risk posed by a lack of availability and access to SMEs, capacity constraint from the project teams can pose a risk to the project schedule due to delayed decision making and progress on work items. Process Panda are well resourced with sufficient consulting availability and capacity to ensure no delays are caused by our team. Prior to the project commencing we will also aim to understand what the County's project roadmap looks like to ensure sufficient capacity can be assured to deliver this project on time.

Further to this, any required documentation or configuration documents will be sent to West Virginia Lotteries' project team prior to kick-off to ensure sufficient time is required kick-off and progress the project on-time.

The customers end-user base is not consulted and actively involved in the discovery and delivery process, leading to sub-optimal outcomes that aren't aligned with their requirements.

Mitigation Strategies: Throughout the discovery phase of the project and throughout multiple milestones, Process Panda's implementation methodology is structured to include multiple opportunities for all West Virginia Lotteries' stakeholders to share feedback about their requirements, needs and vision for the solution. This is important to ensure that at all stages of the project the solution is being designed for those actually using it, and to ensure the desired outcome is being achieved. On top of the structure of the methodology, it's important for West Virginia Lotteries to internally promote their key users and customers to be involved in the project across various stages.

SUMMARY

It is with great pleasure that Process Panda presents this proposal for a comprehensive Enterprise IT Service Management solution for West Virginia Lotteries. Process Panda will hold your business in the highest regard and will provide West Virginia Lotteries unparalleled, platinum-level service experience.

HaloITSM's all-inclusive ITIL platform, modern and intuitive UI, no-code configuration, state-of-the-art AI, plethora of integrations and flexible licensing has propelled HaloITSM into becoming the fastest growing IT Service Management company in the industry. This capability will provide West Virginia Lotteries true Enterprise power without Enterprise cost and complexity. West Virginia Lotteries will not only be receiving our next-generation software but also our unparalleled passion for customer care.



West Virginia Lotteries will be assigned a dedicated team of Project Management, Implementation and Support professionals that will be intimately knowledgeable of your requirements and available for your immediate needs and long-term care.

Our customer on-boarding process is second-to-none in delivering you the user-friendly, high security process and individualized service that you need and deserve. When making your choice, you can feel confident in knowing that we have the capacity, the know-how and the commitment to your business that is unparalleled in the industry. This core competency makes this Process Panda proposal the logical and obvious choice.

We look forward to the opportunity to partner with West Virginia Lotteries for many years to come!



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

**State of West Virginia
 Centralized Request for Quote
 Info Technology**

Proc Folder: 1553835		Reason for Modification:	
Doc Description: IT Service Management (ITSM) Platform Solution		Addendum No. 2 published to extend bid opening date	
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2024-11-15	2024-12-19 13:30	CRFQ 0705 LOT2500000002	3

BID RECEIVING LOCATION
BID CLERK DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION 2019 WASHINGTON ST E CHARLESTON WV 25305 US

VENDOR		
Vendor Customer Code:		
Vendor Name :		
Address :		
Street :		
City :		
State :	Country :	Zip :
Principal Contact :		
Vendor Contact Phone:	Extension:	

FOR INFORMATION CONTACT THE BUYER
 Brandon L Barr
 304-558-2652
 brandon.l.barr@wv.gov

Vendor Signature X	FEIN#	DATE
---------------------------	--------------	-------------

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

The West Virginia Purchasing Division is soliciting bids on behalf of WV Lottery to establish an open-end contract for IT Service Management (ITSM) Platform Solution per the attached specifications, terms and conditions.

INVOICE TO		SHIP TO	
LOTTERY PO BOX 2067 CHARLESTON WV US		LOTTERY 900 PENNSYLVANIA AVE CHARLESTON WV US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	IT Service Management (ITSM) Platform Solution	12.00000	MO		

Comm Code	Manufacturer	Specification	Model #
81162000			

Extended Description:
See Specifications and Exhibit A - Pricing Page for Details

INVOICE TO		SHIP TO	
LOTTERY PO BOX 2067 CHARLESTON WV US		LOTTERY 900 PENNSYLVANIA AVE CHARLESTON WV US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	Implementation & Professional Services Support and Maintenan	150.00000	HOUR		

Comm Code	Manufacturer	Specification	Model #
81112200			

Extended Description:
See Specifications and Exhibit A - Pricing Page for Details

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Questions due by December 2nd, 2024 at 10am ET	2024-12-02

SOLICITATION NUMBER:
Addendum Number:

The purpose of this addendum is to modify the solicitation identified as (“Solicitation”) to reflect the change(s) identified and described below.

Applicable Addendum Category:

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error
- Other

Description of Modification to Solicitation:

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

ATTACHMENT A

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: _____

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input checked="" type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Process Panda

Company



Authorized Signature

8 January 2025

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.
Revised 6/8/2012



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

**State of West Virginia
 Centralized Request for Quote
 Info Technology**

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Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2024-12-17	2025-01-09 13:30	CRFQ 0705 LOT2500000002	4

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Customer Code:
Vendor Name :
Address :
Street :
City :
State : **Country :** **Zip :**
Principal Contact :
Vendor Contact Phone: **Extension:**

FOR INFORMATION CONTACT THE BUYER

Brandon L Barr
 304-558-2652
 brandon.l.barr@wv.gov

Vendor Signature X **FEIN#** **DATE**

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

The West Virginia Purchasing Division is soliciting bids on behalf of WV Lottery to establish an open-end contract for IT Service Management (ITSM) Platform Solution per the attached specifications, terms and conditions.

INVOICE TO		SHIP TO	
LOTTERY PO BOX 2067 CHARLESTON WV US		LOTTERY 900 PENNSYLVANIA AVE CHARLESTON WV US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	IT Service Management (ITSM) Platform Solution	12.00000	MO		

Comm Code	Manufacturer	Specification	Model #
81162000			

Extended Description:
See Specifications and Exhibit A - Pricing Page for Details

INVOICE TO		SHIP TO	
LOTTERY PO BOX 2067 CHARLESTON WV US		LOTTERY 900 PENNSYLVANIA AVE CHARLESTON WV US	

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	Implementation & Professional Services Support and Maintenan	150.00000	HOUR		

Comm Code	Manufacturer	Specification	Model #
81112200			

Extended Description:
See Specifications and Exhibit A - Pricing Page for Details

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Questions due by December 2nd, 2024 at 10am ET	2024-12-02

SOLICITATION NUMBER:
Addendum Number:

The purpose of this addendum is to modify the solicitation identified as (“Solicitation”) to reflect the change(s) identified and described below.

Applicable Addendum Category:

- Modify bid opening date and time
- Modify specifications of product or service being sought
- Attachment of vendor questions and responses
- Attachment of pre-bid sign-in sheet
- Correction of error
- Other

Description of Modification to Solicitation:

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

ATTACHMENT A

Lottery Q & A1
CRFQ 0705 LOT2500000002
IT Service Management (ITSM) Platform Solution

1. How many ITS personnel (agents) will be managing, updating, resolving ITSM tickets?

A1) Per section 5.2 Pricing page: The vendor should complete the Pricing Page by entering the cost per agent for a total of thirty (30) agents per month, multiplied by 12 months.

2. What are the implementation timelines of the project (tentative start and end date)?

A2) This is an annual contract, and work is paid for on an hourly basis.

3. What is the estimated budget for this RFP?

A3) The State of WV does not provide budget information.

4. Will the agency accept the remote implementation as our proposed solution in cloud-based?

A4) Yes, per section 1. Purpose and Scope: The preferred solution extends and builds on existing and planned investments in Microsoft Power Platform and its ecosystem of products.

5. What is the proposal format for this CRFQ or the we can use our own format for preparing our proposal?

A5) See Section 9. BID FORMATTING – *Vendor should type or electronically enter the information onto its bid to prevent errors in the evaluation. Failure to type or electronically enter the information may result in bid disqualification.*

6. Could you kindly share an approximate estimate of the number of users your department envisions for this initiative?

A6) Up to 30 agents and 200 end users.

7. It is mentioned in *Section 1 – Purpose and Scope* that the ITSM system shall include an IT Asset Management module, however there is no line item for that module in *Exhibit A – Pricing Page*. Should we add a row in the pricing table for that module?

A7) No, any product or service not on the Agency provided Pricing Page will not be allowable, the state cannot accept alternate pricing pages.

Lottery Q & A1
CRFQ 0705 LOT2500000002
IT Service Management (ITSM) Platform Solution

However please see the attached revised Exhibit A – Pricing Page with the added IT Asset Management module.

8. What are the current challenges or limitations with the on-premise ITSM system that the new system should address?

A8) The current system does not have an employee-facing service portal.

9. Can you provide examples of specific ticketing purposes or workflows you envision adapting for other business areas beyond ITSM?

A9) No.

10. What is the on-premises system? Is it a third-party application or is it a "homegrown"?

A10) Third party, Spiceworks.

11. Are there any specific configurations or customizations expected for the out-of-the-box connectors to Microsoft Power Platform, Entra ID, Azure Intune, or Azure DevOps?

A11) No.

12. What are the existing or planned investments in Microsoft Power Platform, and how should the new system align with these investments?

A12) The solution must be native to the Power App platform and support new features made available over time from Microsoft.

13. Are there any additional accessibility standards beyond WCAG 2.1, Section 508, and EN 301 549 that the system should consider?

A13) No

14. Are there other certifications or compliance requirements (e.g., GDPR, HIPAA) necessary for the system?

A14) No

15. Can you clarify the scale and complexity of IT asset management needs (e.g., number of assets, types of assets, how are they discovered/tracked today)?

A15) There is no existing asset management system today.

16. Are there specific ITIL processes prioritized by WVL? How rigid is the need for ITIL alignment?

A16) No.

Lottery Q & A1
CRFQ 0705 LOT2500000002
IT Service Management (ITSM) Platform Solution

17. Will ITIL training be required?

A17) No

18. Are there preferred formats or methods for the live online training and documentation for system administrators and end-users?

A18) No

19. Is there potential for expansion beyond the initial 30 users? Should scalability be factored into the solution?

A19) Yes.

20. What is the expected timeline for deployment, and are there milestones or deadlines to meet?

A20) This is an annual contract, and work is paid for on an hourly basis.

21. What are the specific performance or uptime expectations for the platform, and are there penalties for SLA breaches?

A21) The RFQ does not specify uptime expectations or SLA penalties.

22. Are there anticipated requirements for system updates, patches, or future expansions that the vendor should account for?

A22) The RFQ does not specify requirements for system updates, patches or future expansions.

23. Does the pricing need to accommodate a per-user, per-module, or flat-rate model?

A23) Vendors should complete the pricing sheet with the total annual cost for the ITSM and ITAM capabilities. The specifications require licensing for a minimum of 30 users.

24. Will WVL require ownership of any customizations or configurations developed as part of the implementation?

A24) No

25. What are the specific data security requirements, including encryption standards, data residency, and backup/recovery protocols?

A25) These capabilities must be provided by and native to the Microsoft Power app platform. Data must reside in the continental US.

26. Are there other tools or platforms that will need to integrate with the new ITSM system beyond those mentioned?

A26) No

27. Can you provide examples of how other business areas may leverage the ITSM platform for non-IT ticketing purposes?

A27) No.

28. Are there long-term plans or scenarios that the platform should be able to support, such as additional modules or other compliance needs?

Lottery Q & A1
CRFQ 0705 LOT2500000002
IT Service Management (ITSM) Platform Solution

A28) None at this time.

29. How will WVLC prioritize and evaluate bids (e.g., cost, functionality, vendor experience)?

A29) Lowest cost that meets the specification.

30. Beyond the minimum experience requirements, are there other qualifications or case studies expected from vendors?

A30) No, all qualifications and experience requirements are documented in the procurement.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: _____

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

<input checked="" type="checkbox"/> Addendum No. 1	<input type="checkbox"/> Addendum No. 6
<input checked="" type="checkbox"/> Addendum No. 2	<input type="checkbox"/> Addendum No. 7
<input checked="" type="checkbox"/> Addendum No. 3	<input type="checkbox"/> Addendum No. 8
<input type="checkbox"/> Addendum No. 4	<input type="checkbox"/> Addendum No. 9
<input type="checkbox"/> Addendum No. 5	<input type="checkbox"/> Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Process Panda

Company



Authorized Signature

8 January 2025

Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.

Revised 6/8/2012



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
 Centralized Request for Quote
 Info Technology

Proc Folder: 1553835		Reason for Modification:	
Doc Description: IT Service Management (ITSM) Platform Solution		Modified to correct error in solicitation documents for bid opening date. Bid opening is December 1..... See Page 2 for complete info	
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2024-11-15	2024-12-12 13:30	CRFQ 0705 LOT2500000002	2

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Customer Code:
Vendor Name :
Address :
Street :
City :
State : **Country :** **Zip :**
Principal Contact :
Vendor Contact Phone: **Extension:**

FOR INFORMATION CONTACT THE BUYER

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 brandon.l.barr@wv.gov

Vendor Signature X **FEIN#** **DATE**

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Reason for Modification:

Modified to correct error in solicitation documents for bid opening date. Bid opening is December 12th, 2024 at 1:30pm ET

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US		US	

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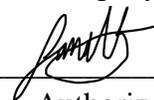
Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
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Company



Authorized Signature

Date

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Revised 6/8/2012