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# **Response to State of West Virginia DOA OIT One Stop Permitting Program CRFI SEC260000001 RFI For a One-Stop-Shop permitting program**

**August 29, 2025**

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**August 29, 2025**

Tara Lyle  
West Virginia Purchasing Division  
2019 Washington St E  
Charleston, WV 25305

***Re: State of West Virginia DOA OIT, Request for a One-Stop-Shop permitting program***

Ms. Tara Lyle:

Salesforce appreciates the opportunity to respond to the State of West Virginia's request for One-Stop-Shop permitting program CFRI SEC26\*01. While Salesforce system integrators will also be directly responding to the RFI with their proven expertise, implementation approach, and best practices, Salesforce is providing an alternative RFI response that provides an overview of our proposed solution and recommendations.

West Virginia is seeking a one-stop permitting solution that can provide a streamlined, single door for individuals and businesses to access government services and receive a seamless, user-friendly customer experience. While also providing the future proof flexibility and scalability required to expand these capabilities over time to modernize the backend permitting and inspections processes which will be required to optimize efficiency and effectiveness for the citizens of West Virginia.

Salesforce is pleased to present our capabilities to help West Virginia deliver a One-Stop-Shop permitting program. Salesforce is the world's enterprise cloud computing leader, dedicated to helping companies and government agencies transform and connect through cloud, social, and mobile technologies. Our 150,000+ customers include over 4,200 government agencies worldwide, representing all federal cabinet level agencies and the majority of the United States. Cloud computing offers a tremendous opportunity for the government to consolidate and innovate, freeing up time, money, and resources towards agency productivity. Salesforce provides the #1 ranked Platform as a Service (PaaS) and the World's #1 Software as a Service (SaaS) CRM solution. Salesforce's world leading, trusted cloud platform allows agencies and partners to build applications that achieve a 59% accelerated time to value, implementing solutions in weeks and months vs. months or years, compared to on-premises system implementations. It is one of the many reasons why Forbes named Salesforce one of the World's Most Innovative Companies nine years in a row and Innovator of the Decade.

We look forward to building a long-lasting relationship to support West Virginia in its technology and program innovation efforts and the opportunity to meet with you and provide a formal demo to further educate your team on our capabilities.

I can be contacted at 804-366-9674 or [ryan.willett@salesforce.com](mailto:ryan.willett@salesforce.com) with any questions or clarifications.

Thank you for your time and interest in our solution.

Sincerely,

A handwritten signature in black ink, appearing to read "Ryan Willett".

**DISCLAIMER:** *Salesforce is a leading provider of innovative cloud services, continuously advancing our technology. We have made a diligent effort to provide accurate and current responses to your request as of the date of this response. Please be aware that Salesforce's procedures and policies may evolve over time, and we regularly introduce multiple major release upgrades each year. Consequently, the information provided herein may be subject to change.*

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*This response includes confidential and proprietary data that shall not be disclosed outside the recipient organization and shall not be duplicated, used, or disclosed—in whole or in part—for any purpose other than to evaluate this response. If a contract is awarded to Salesforce in connection with the submission of this data, then the recipient shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. Except to the extent prohibited by the express terms of the solicitation, Salesforce provides the confidential and proprietary information herein with the expectation that it will be exempt from disclosure under applicable federal, state, or local laws*



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## Executive Summary

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The West Virginia Department of Administration (WV DOA) is seeking information to establish a **state-of-the-art One-Stop-Shop Permitting Program**, a critical initiative driven by House Bill 2002. With this House Bill comes expectations: process transparency, a reduction in application processing time, becoming a customer service-oriented organization, and driving efficiency and predictability across agency operations. These expectations were established to address critical infrastructure projects and projects delivering significant economic growth to the West Virginia business community and constituents—the kind of expectations Salesforce helps government agencies meet and exceed through comprehensive digital modernization.

As a business partner and leading technology platform, Salesforce can deliver on this vision as the only enterprise, cloud-native, low-code platform leader with out-of-the-box functionality to support permitting, licensing and inspection capabilities - purpose-built for state government.

This is further supported with the leading Customer Relationship Management (CRM) & low-code technology, while being proven across **125+ government agencies in 25 states to meet their permitting, Licensing, and inspections requirements** - and being validated by Gartner as both a leader in low-code and customer engagement. Salesforce is uniquely positioned to provide a **secure, scalable, and citizen-centric solution** that will revolutionize West Virginia's permitting and licensing processes.

This is as much about technology as it is about having a proven and trusted business partner to support West Virginia's vision. Due to the success of our clients, Salesforce is globally recognized as one of the world's most admired and innovative companies that guides the world's largest organizations and government agencies on how best to leverage technology to improve customer experiences and drive operational efficiency. Through our experiences, we have established the trust of global leaders to collaborate on workforce modernization, business challenges, technology considerations and most recently, how best to implement secure and trusted Artificial Intelligence (AI). The benefit to West Virginia is having both a leading technology platform, complemented by a business partner that has resources and expertise to support the administration in achieving your vision. This benefit extends to reducing your risk and exposure on a high-profile initiative that will have a dramatic impact on West Virginia's business community and constituents.

### Our Understanding of the Challenges to Achieve West Virginia's Enterprise Vision

To achieve the enterprise **One-Stop-Shop Permitting Program** vision, it is important to understand the challenges that exist today in providing a seamless service experience to the business community and constituents within the State of West Virginia. Far too often users must navigate through confusing screens and disjointed user experiences that derail license applications from getting submitted efficiently, or there are too many manual and time-consuming processes and systems for employees to navigate to approve an application. This creates a lack of transparency on the status of a permit, payment, appeal, renewal, etc. for business users, constituents, and agency staff. In our experience, the root cause of these challenges includes manual, paper-based processes and siloed legacy systems that lack mobility. These systems are often custom-coded and deployed on-premises, limiting the organizations' ability to innovate and stay current with business and cybersecurity requirements.

The result: an inconsistent user experience, manual processes, and limited data transparency, all of which will impact any organization's ability to deliver quality service. This is usually correlated with, and further compounded by, limited engagement channels and no single-entry point to access government services. Agencies that do not have a CRM-based, single source of truth strategy on the back end often carry the same siloes through to the front-end customer experience. This fragmented approach makes it **harder to meet customers where they are, deliver timely communication in the customer's channel of choice, and share information between channels as a part of a journey**. The RFI highlights a clear need



for a comprehensive external facing portal as well as a unified approach to replace potentially siloed data and legacy tools, ensuring a seamless experience for all stakeholders across a multitude of agencies.

### **Available Marketplace Approaches to Achieve West Virginia's Enterprise Vision**

To overcome these challenges, you need to find a **future-proof, scalable, and secure platform** that **directly addresses West Virginia's vision for a One-Stop-Shop Permitting Program**.

Your stated intent of this program is set to.

- Revolutionize and streamline West Virginia's permitting system.
- Creating an online dashboard for processing and tracking permits
- Provide flexibility and scalability to address today's needs across the enterprise, as well as address the future needs.
- Enhance public awareness, collaboration, accountability, coordination, transparency, and predictability in the state's permitting, licensing, and authorization processes.
- Manage critical infrastructure projects and projects delivering significant economic development to West Virginians

To best address your vision and goals, we recommend first selecting a low-code platform with out-of-the-box (OOTB) functionality for permitting, inspections, and licensing further supported by Customer Relationship Management (CRM) capabilities. With that in mind, West Virginia will hear from a variety of low-code software companies that may claim their ability to meet OOTB platform and permitting, inspections, and licensing requirements described within the RFI and House Bill 2002. This may include low-code vendors that position an "accelerator" from an implementation partner, or a "playbook" with directions on how to meet your OOTB requirements for permitting, inspections, and licensing.

Salesforce is not dependent on third party applications or accelerators to meet your requirements and despite having a vast partner ecosystem with many third-party options, we chose not to offer this approach for the following reasons:

- Salesforce provides a generally available product, Public Sector Solutions (PSS), that includes our pre-built application known as: Licensing, Permitting and Inspections (LPI). PSS and LPI with built-in Artificial Intelligence (AI) and mobile-enablement, inherit the power of our CRM and low-code platform to meet West Virginia's One-Stop-Shop Permitting Program.
- An accelerator is not a product with the commitment of a software manufacturer to provide consistent maintenance, support, and security and functional upgrades. Whereas the Salesforce LPI application is a product with a full team behind it consisting of product managers, development teams, customer support, customer advisory board, etc. and is upgraded three times per year, seamlessly.
- With a third-party accelerator, West Virginia would not be evaluating a product of a platform, but the intellectual property from a vendor's implementation partner, which may bind you to working with that vendor. This may present challenges to West Virginia in the event an RFP for services is released in the future for implementation support.

Given that the Salesforce product can meet West Virginia's vision for a One-Stop-Shop Permitting Program requirements out of the box, without the need for third parties, we determined it was not necessary to include. With that said, If Salesforce were to be selected as your platform of choice, we would offer introductions to the partners within our ecosystem that offer accelerators and products for





your consideration, many of which are available via the [Salesforce AppExchange](#). Through our experience with projects similar to West Virginia's vision, a client may elect to use third party applications within our ecosystem to meet unforeseen requirements and business needs or to further enhance their system.

Other options in the marketplace that may be considered include Commercial Off the Shelf (COTS) products that bring OOTB functionality but lack a low-code platform foundation and, thereby, lack extensibility and configurability, creating reliance on the COTS vendor and lack critical CRM functionality to assist with customer service-related requirements. These products are not built with a cloud-native architecture and therefore are challenging to upgrade and manage change, costs, control, access data, etc. Often these solutions are not mobile enabled, nor available in off-line modes for field staff, OOTB and require heavy customization to meet that need. Such an approach will limit West Virginia's ability to scale and evolve to meet future needs and is cost prohibitive. This is fundamentally different from Salesforce and our cloud-native architecture that is powered by a low-code platform at its foundation. This is further differentiated with Salesforce's unified architecture, *via a single code base - not a stack*, which includes the low-code Salesforce Platform, our industry-leading CRM functionality, and our PSS product with purpose-built functionality via our LPI application to meet your permitting, inspections and licensing requirements.

When compared to alternative options available in the marketplace today, Salesforce is able to fully meet the key technology requirements presented in House Bill 2002 and your RFI, meeting West Virginia's vision for a One-Stop-Shop Permitting Program. Perhaps more importantly, the Salesforce Public Sector Solutions product has been deployed and tested by 126+ government agencies across 26 states. This widespread adoption demonstrates its reliability and effectiveness. Multiple system integration partners have implemented the product, and many government agencies maintain it, leading to faster solution delivery and a lower total cost of ownership.

### **A Salesforce Solution for West Virginia's One-Stop-Shop Permitting Program**

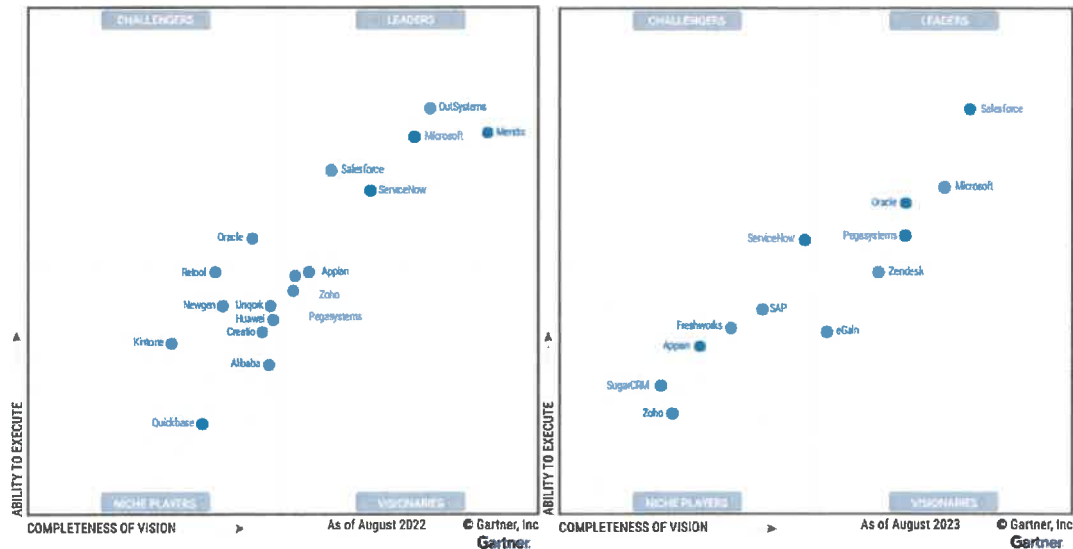
Salesforce is best positioned to deliver on West Virginia's vision by providing the only enterprise, cloud-native, low-code platform with out-of-the-box functionality to support permitting, licensing and certification requirements for State government. This is further supported with the leading Customer Relationship Management (CRM) and Artificial Intelligence (AI) technology, which will be critical to not only meet the needs of the your requirements but the vision to implement a single online destination that will enable constituents, individuals, and business partners to locate services and conduct business with the State of West Virginia, even if they do not know which agency to contact. The entirety of the Salesforce RFI response will go into detail in terms of how our Solution supports this vision but below are five of the most critical components of our solution and approach.

1. Combine the Power of a Low-Code Platform + CRM + Purpose-built LPI Functionality
2. Putting the Customer at the Center of Your One-Stop-Shop Permitting Program
3. Accelerate Permitting Program Innovation with Automatic and Seamless Upgrades
4. Real-time Data and Analytics to Drive Transparency for the Public & Internal Stakeholders
5. Leverage the Most Robust Partner Ecosystem to Ensure Maximum Value, Flexibility and Choice

#### **#1 Combine the Power of a Low-Code Platform + CRM + Purpose-built LPI Functionality**

Salesforce is uniquely positioned to provide the State of West Virginia with a One-Stop-Shop Permitting Program system designed using our purpose-built government product - Public Sector Solutions (PSS) and our Licensing, Permitting and Inspections (LPI) application, which incorporates the best practices and industry standards for the purposes of permitting, licensing, and licenses. Salesforce PSS is built on

Salesforce's [industry-leading enterprise low-code platform](#) - designed to facilitate rapid application development, workflow, integration, reporting, and agile response to new and changing requirements - coupled with decades of investment in the [industry-leading CRM](#) solution - designed to modernize the customer engagement, streamline processing, and maximize automation. Salesforce is the only solution that is **recognized as a leader by Gartner for both Low-Code and Customer Engagement** - that is further supported with an out-of-the-box product, PSS, to support permitting, inspections and licensing requirements for state government.



**Magic Quadrant for the CRM Customer Engagement Center Platforms**

**Magic Quadrant for Enterprise Low-Code Application Platforms**

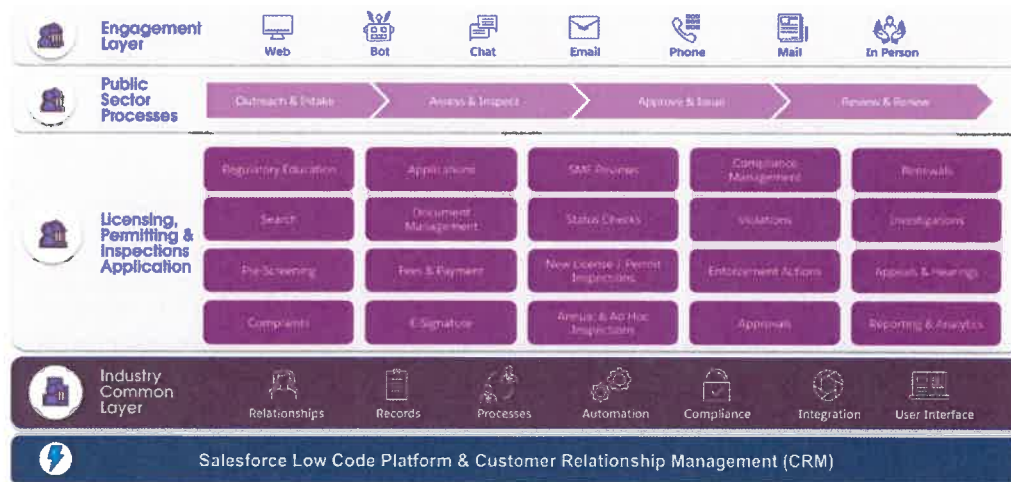
Salesforce Public Sector Solutions and the LPI application benefit West Virginia's One-Stop-Shop Permitting Program vision by providing:

- **Dedicated product team & LPI expertise.** Salesforce has dedicated product managers, a product roadmap with backlogs, development teams, subject matter expertise and three new releases per year - specifically for LPI use cases. This is further governed and supported by direct feedback from our LPI customers to our Customer Advisory Board to further enhance our LPI application.
- **Accelerated time to value with 21% faster application deployment.** Pre-built features for licensing, permitting, and inspections with product documentation to reduce implementation complexity complemented by data models and workflows for permitting, licensing, and certifications with omni-channel design to accelerate time to value.
- **Decreased IT costs by 22% with clicks, not code.** Low-code/no-code will allow West Virginia to meet the flexibility and scalability requirements via configuration, not customization. Configuration-based approach reduces the need for extensive custom coding and a lower code base, minimizing testing/retesting activities and reducing technical debt.
- **Intuitive user experience.** PSS provides an out of the box intuitive user interface grounded on user research from Public Sector agencies to provide relevant information needed to make decisions and guide the user down the process.
- **Reduced project risk** by helping both business and IT visualize the process, logic, user experience, as the system is being built with low-code and out-of-the-box capabilities (guided flows, intuitive user interface) and data model with standard objects designed for permitting, inspections, and licensing.



- **20% decrease in custom development one-off projects.** Continuous product innovation means pre-built PLC-specific capabilities are updated and released 3x a year. New software functionality minimizes the need to build new capabilities.

## Salesforce Public Sector Solutions



Source: Salesforce Customer Success Metrics Database

Salesforce PSS inherits the power of our low-code platform and CRM functionality with the significant differentiator being our maturity, depth, and breadth of our LPI application and data model, as compared to other low-code vendors in the market. The LPI application and data model are the primary reason our clients go-live quickly and decrease their Total Cost of Ownership (TCO). Salesforce PSS has scaled to meet LPI requirements for government agencies around the world, therefore we have made significant investment with dedicated product development resources. Salesforce's commitment to a LPI product is a direct benefit to West Virginia and Salesforce would like to provide you with direct access to our Product Development organization to directly influence the capabilities made available through upcoming releases. Through the Salesforce Executive Sponsor Program, Salesforce would like to connect you with Nasi Jazayeri, Executive Vice President of Public Sector Solutions, to establish and grow long-term committed peer relationships with West Virginia's senior leadership. Nasi will remain invested in West Virginia and the One-Stop-Shop Permitting Program's success by connecting West Virginia to the right resources, participating in account reviews and escalations, and listening to feedback to ensure satisfaction with your Salesforce relationships.

Salesforce would offer West Virginia the opportunity to participate in Customer Advisory Boards. A limited number of our most strategic, innovative customers are invited to participate in our industry-based Customer Advisory Boards (CABs). These strategic boards meet twice yearly and consist of about 20 senior executives from top customer organizations and senior Salesforce leadership who engage in a 1–2-day meeting. CABs will provide West Virginia with a platform to share your perspective and help us gain a better understanding of the priorities shaping your business and the One-Stop-Shop Permitting Program system.

## #2 Putting the Customer at the Center of Your One-Stop-Shop Permitting Program

With customer-centric digital engagement capabilities, Salesforce's CRM solution provides a secure, multi-channel enterprise platform that puts the customer - whether a business, individual, or agency

stakeholder - at the center of all permitting, licensing, and inspections services providing a 360 degree view of the customer (Customer 360) and a chronological view of all interactions (e.g., applications, renewals, refunds, activities, notes, appeals, "fast-track" prioritization, etc.), which allows West Virginia to build out a complete single record of all encounters with each customer over time. Often, permitting, inspections, and licensing systems are case, task, or service request-centric, making it difficult to get a complete picture of the business or individual. This often results in a highly transactional system that does not focus on customer service. Using customer-centric CRM as the foundation for the LPI, the Customer 360 builds a comprehensive history of all critical customer data and their interactions within and across West Virginia -- cases, tasks, and service requests included.

The [New Mexico Regulation & Licensing Department](#) (NMRLD) is a great example of an agency taking a customer-centric approach to the modernization of the licensing systems. New Mexico was looking to improve service experience with self-service portals, improve visibility with real-time dashboards, and provide cross-functional consistency across programs to drive efficiency. To execute on this vision, the

*"And we have had zero bug reports. Zero. Instead, we have received a lot of feedback that has been 'This is so easy. Thank you so much.' or 'It makes perfect sense. It's logical. The flow works. It's all about the customer, their records, and their license, which has really strengthened their relationships with our team here at NM RLD.'"*

**New Mexico Regulation and Licensing Department**

NMRLD launched a digital licensing system on Salesforce's PSS product. It gives NMRLD the low-code and no-code digital tools they need to offer a single, consistent way for customers and staff members alike to access license documentation on the front end without compromising the ability to configure workflows to fit program-

specific needs on the back end.

### #3 Accelerate Permitting Program Innovation with Automatic and Seamless Upgrades

Salesforce is committed to continuous innovation which offers West Virginia the following benefits:

- **Real-time upgrades.** West Virginia will always be on the latest version of the Salesforce Platform because every customer receives instant upgrades. Each time we release a new version; the entire community can take advantage of the latest innovations from our product development team. This means all Salesforce customers are on the same, latest version.
- **Rapid innovation.** Because Salesforce can deliver new capabilities without impacting the One-Stop-Shop Permitting Program deployment, West Virginia will not be required to go through years-long release cycles. Instead, Salesforce delivers new capabilities three times each year, and West Virginia can choose when to adopt these new capabilities simply by opting in.
- **Upgrades do not break your customizations or integrations.** All customizations continue working, changes to the user experience are based on when user's opt-in to new capabilities, and custom code keeps working whether it was written by the customer or third parties. Salesforce's multi-tenant service maintains backward compatibility with the API used for integration. West Virginia only has to integrate with the service once, and that integration will keep running even as we upgrade the platform.
- **Less reliance on IT.** West Virginia will not have to balance the desire to upgrade and take advantage of new features with the time and costs required to deploy software, redo previous customization and integration work, and train users on the new version.

With our approach to seamless upgrades, West Virginia can have a futureproof architecture that is consistently updated with the latest innovation and functionality from Salesforce. Salesforce's approach to upgrades is far different given that Salesforce is built on a cloud native architecture whereas alternative approaches can require months to prepare for what can be costly and time-consuming upgrades.



#### #4 Real-time Data and Analytics to Drive Transparency for the Public & Internal Stakeholders

Real-time views of data and key metrics will allow West Virginia to improve outcomes, measure response, and facilitate reporting within the system. Capabilities like data visualization, trend analysis, and performance and outcome measurement help the State to continuously improve service delivery, processes, and systems, as well as be proactive with identifying needs or actions required for individuals and businesses. Actionable insights based on real-time data help permitting and inspections staff manage the complexities of permitting, licensing, and inspections customers and help deliver services in the most efficient and seamless manner. West Virginia can use data to direct resources where they are needed the most and can have the greatest impact in servicing customers.

Salesforce's customer-centric approach to managing permitting, licensing, and certification data tracks progress and activity through built-in analytics and dashboards. All customer data -- from agency employees, individuals, businesses, and anyone else involved in delivering services to a customer -- is captured in a single platform fully equipped with integrated reports and dashboards. This enables PLC staff and managers to identify trends, set Key Performance Indicators (KPIs), establish standards and control performance, as well as quantify best practices, and measure results.

*"The Salesforce PSS solution not only streamlines internal processes but also offers complete transparency into the licensure and renewal process for our constituents.*

*This has significantly improved their experience and trust in our system."*

**Amanda Quintana, Acting Executive Director, New Mexico Medical Board**

Salesforce Tableau and Tableau Next is an AI-powered analytics platform that helps West Virginia automatically discover and visualize trends in its permitting data.

With this platform, the state can:

- Make smarter, data-driven decisions at every level.
- Act faster based on the latest data science.
- Get insights infused directly into every workflow, since the platform is native to Salesforce.
- Analyze data from any source.
- Take immediate action on insights while interacting with a customer or case.

Here are some sample visualizations noting trends and KPIs for a few programs.

# NYC Department of Buildings - Permit Analysis

Filter the dashboard by the following categories:

Borough

Permit Status

Filing Status

Permit Type

Permit Subtype

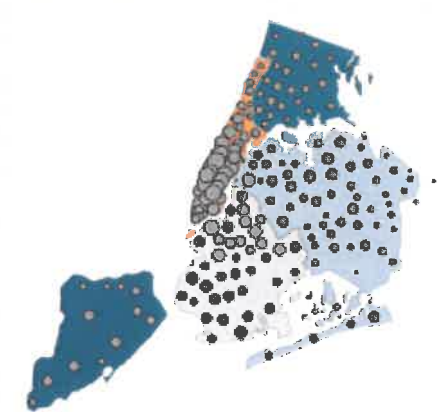
Year

## Executive Summary



## Permit Overview

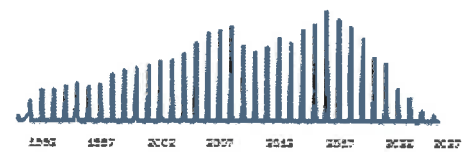
Permit Locations



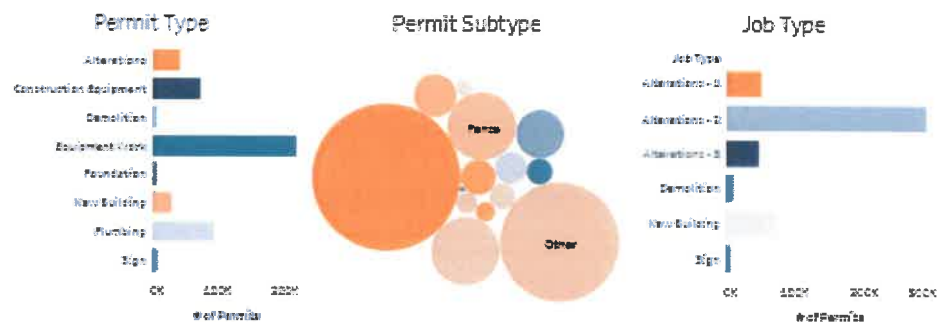
Permit Status



How do permits trend over time?



What type of permits are being issued?



Contractor License Types






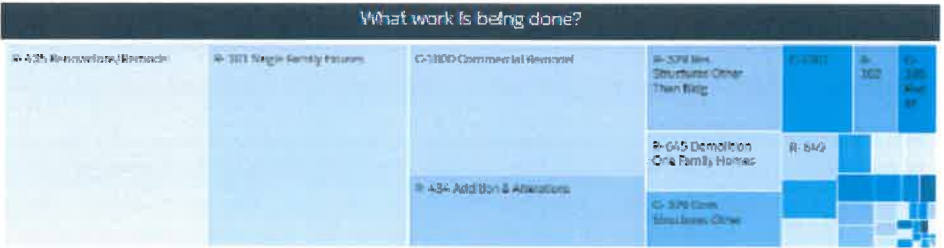
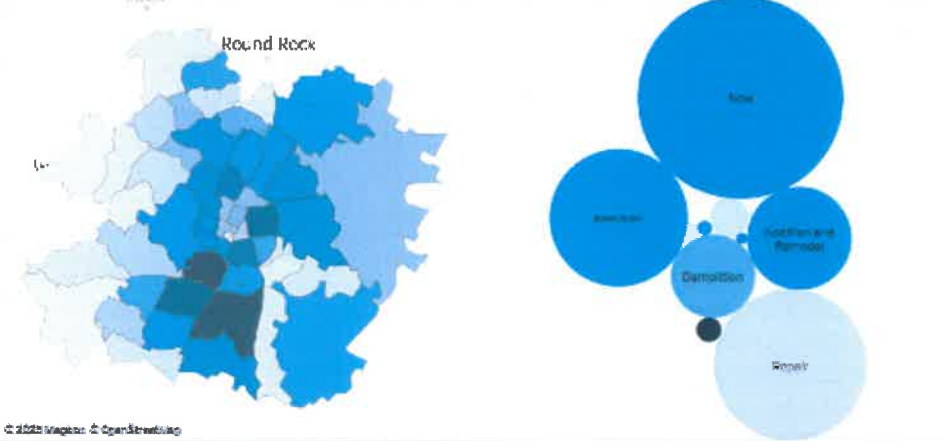
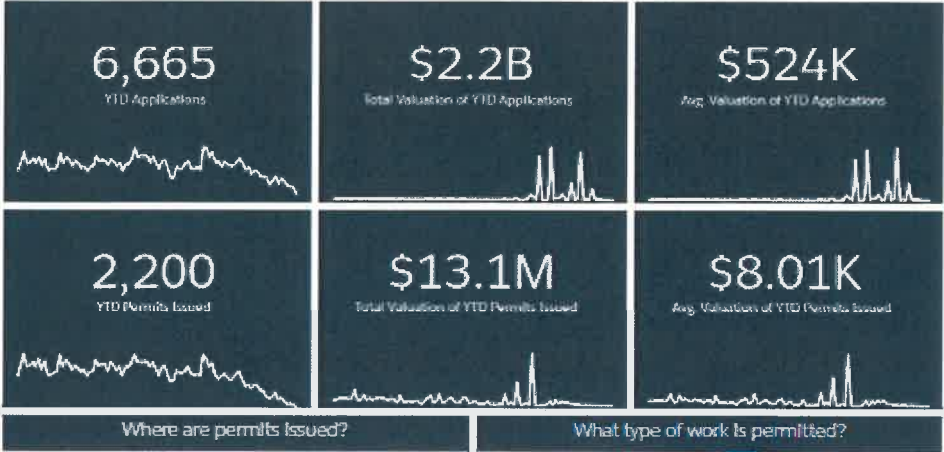
# LICENSING, PERMITTING, & INSPECTIONS

BUILDING PERMITTING & INSPECTIONS ACROSS THE CITY

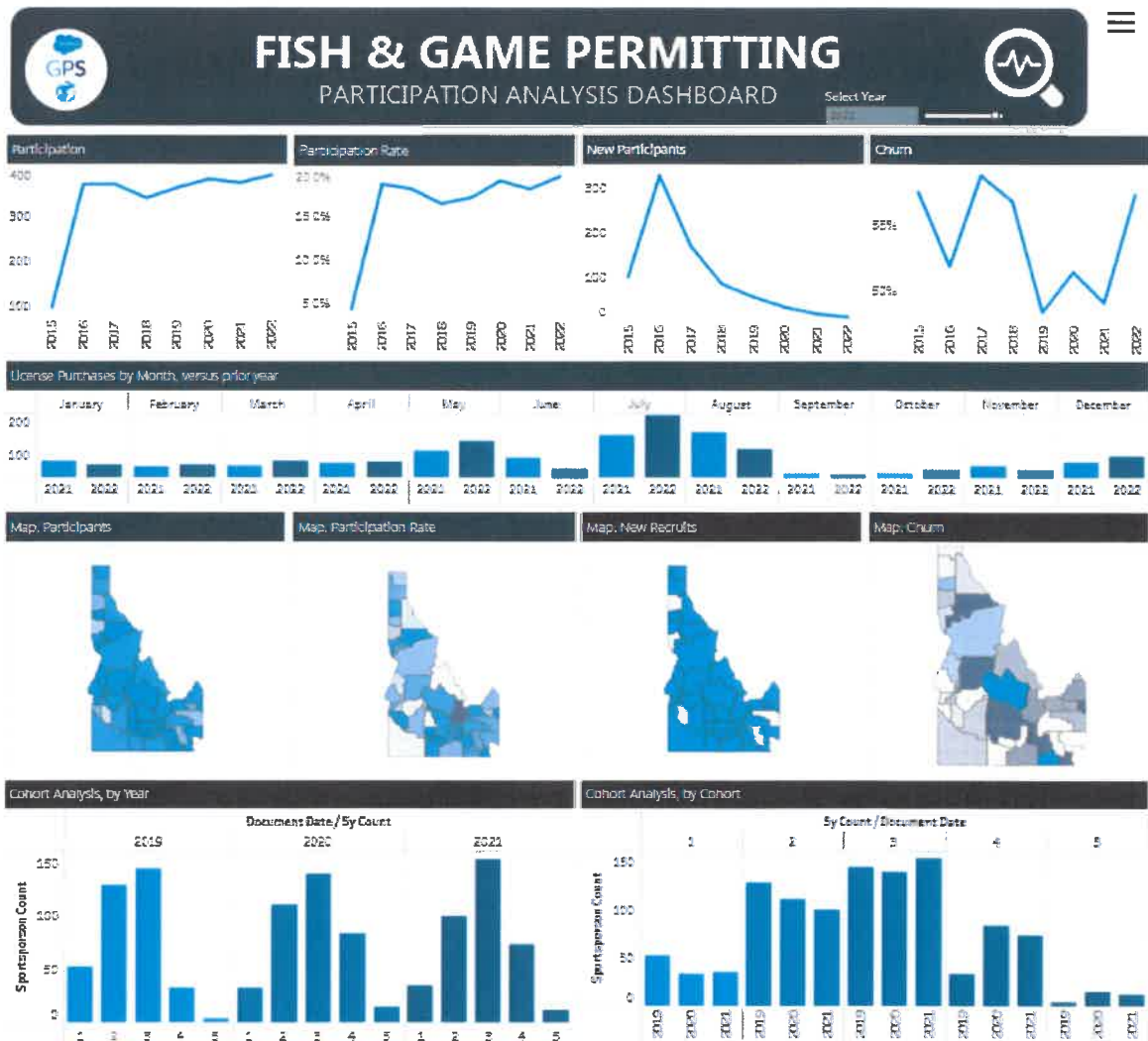




## EXECUTIVE SUMMARY









## Department of Environmental Protection

### Permitting & Forecasting Dashboard



49,012

# of Tanks

45,240

Tanks over x years

3,343

Non-Conforming Tanks

53

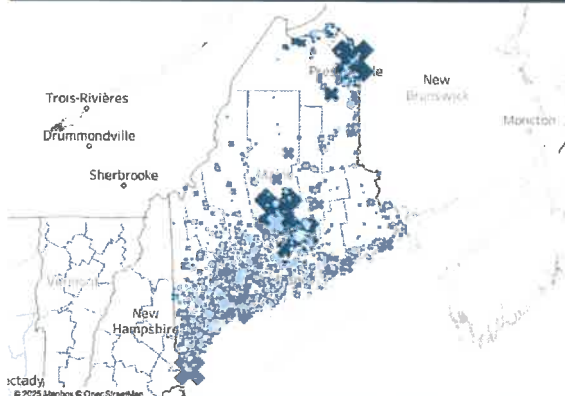
Median Tank Age (in years)

8.3K

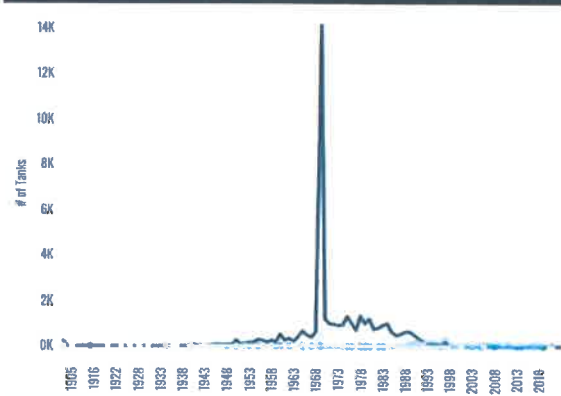
Avg. Tank Volume in Gallons



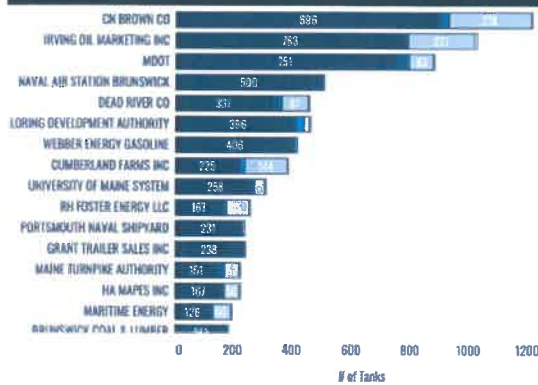
#### Where are tanks located?



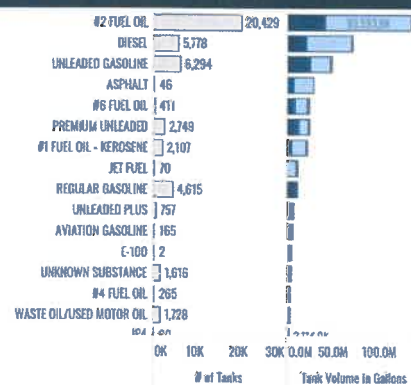
#### When were the tanks installed?



#### Who has the most tanks in the State?



#### What are the tanks storing?



#### Tank Details

Account Name	Asset ID	Date Tank Installed	Usage End Date	Annual Inspection Date	Date Tank Warranty Expir...	Tank Status (group)	Tank Material	Tank Age (in years)	Tank Volume
1ST AT&T CORP	0215000001U1AAG	9/1/1962	Null	Null	Null	Abandoned	STEEL - BARE OR ASPHALT COATL	63	8,000
1ST CONGREGATION CHURCH UCC	0215000001U1AAG	7/1/1986	Null	Null	Null	Removed	STEEL WITH CATHODIC PROTECTI	39	1,000
BRUNSWICK PORT & HARBOUR	0215000001U1AAG	7/1/1986	Null	Null	Null	Removed	STEEL WITH CATHODIC PROTECTI	39	1,000



## **#5 Leverage the Most Robust Partner Ecosystem to Ensure Maximum Value, Flexibility and Choice**

To ensure West Virginia's success and lower your overall total cost of ownership, it is critical that the State have access to a robust ecosystem of skilled and certified resources to assist in the development and ongoing evolution of the system. This is critical to providing the optimal choice of vendors for West Virginia, ensure flexibility going into the future and reduce overall risk. Salesforce brings the largest partner ecosystem among low-code and COTS vendors in today's permitting, licensing, and certification marketplace. The Salesforce partner ecosystem includes consulting partners, digital agencies, independent software vendors, and resellers that bring apps and expertise to deliver modern and innovative, mission-critical systems to government agencies. Seventy percent of Salesforce implementations are led by our 132,000 [credentialed Salesforce experts](#). [According to IDC](#), the Salesforce ecosystem of partners is on track to grow to nearly 6X the size of Salesforce itself by 2026. And together with our partners, the Salesforce ecosystem is expected to create 9.3 million new jobs and \$1.6 trillion in new business revenue for our customers by 2026. The Salesforce business [partner ecosystem](#) helps customers grow faster and reach further. Throughout a customer's journey, experts bring deep Salesforce knowledge and industry best practices to offer solutions across products, industries, and regions.

Many smaller niche COTS rely on their own limited pool of certified resources to deliver their solutions creating a reliance on that vendor for any future changes or modifications to the product. Other smaller, low-code platforms have a smaller pool of system integrator partners who have primarily worked with their product in the commercial space. Salesforce's system integrator partner ecosystem brings the powerful combination of highly skilled Salesforce resources with experience implementing government permitting, licensing, and certification systems. Developers range in experience from the business user to the hardcore coder, and we are here to support all of them. The [Salesforce Developer](#) community is a million strong, and we give them all access to the Salesforce Customer 360 platform and a toolbox of [App Cloud](#) services. They use these tools to build powerful apps at record speed – they are dedicated and innovative, frequently turning out new solutions and capabilities.

In addition, the Salesforce AppExchange is the #1 trusted enterprise cloud marketplace, featuring more than 6,900 apps and experts. In fact, more than 91% of Salesforce customers, from small organizations to enterprise agencies, have installed at least one app from the AppExchange. In all, there have been more than 9.6 million app or solution installs. Proven AppExchange apps and certified expertise help customers extend the capability of the Salesforce Customer 360. These peer-reviewed apps are available for nearly any business process, and they can be customized to meet your specific needs.

### **Accelerating Growth: A Strategic Partner for West Virginia's One-Stop-Shop Permitting Program**

Salesforce commends West Virginia for undertaking such a forward-thinking approach to changing the way the State delivers digital services to provide an optimal customer-focused experience. Salesforce is one of the most trusted technology platforms in the world, helping our customers create their own customer-centered organizations and drive next-level customer outcomes. In our work with over 4,200 government agencies around the world, we have built trust with our customers and proven that Salesforce's unique combination of purpose-built industry capabilities coupled with a CRM solution, all built on a low-code platform, provides the critical tools to deliver large scale enterprise government modernization projects. Salesforce brings solutions built on the cloud that enable complete configurability to user needs, which lower total cost of ownership and bring freedom from many limitations of legacy IT, without causing disturbance to existing core systems. It connects critical organizational data, delivers organizational agility, puts greater control of processes and information in the hands of business users and delivers much faster time to market and value than traditional technology.

Using the proven permitting, inspections and licensing capabilities of the PSS product, tested and successfully delivered across the United States for numerous licensing and permitting use cases, including in states like New Mexico and [Wisconsin](#), reduces West Virginia's risk and overall total cost of ownership. With a low-code platform at the foundation of PSS, West Virginia will have the ability to evolve the One-Stop-Shop Permitting Program system into the future as new requirements or changes emerge



in the future for permitting, inspections and licensing or expanding into other areas of government service delivery, such as one-stop for government services, similar to what Salesforce has done with the states of [Delaware](#) and [Connecticut](#).

The benefit to West Virginia is having a partner that has been used as the platform for large scale, enterprise deployments for licensing and permitting initiatives, in addition to the experience of being used as a one-stop shop for services. With this experience, Salesforce can complement West Virginia by becoming a trusted business partner that has resources and expertise to support the administration in achieving your vision and economic growth goals, while reducing your risk and exposure on a high-profile initiative that will have a dramatic impact on West Virginia's business community and constituents.

Given our proven track record, we are confident that Salesforce is the right partner for West Virginia. Our platform's inherent **flexibility and scalability** make it the ideal solution for modernizing permitting, licensing, and inspection programs across multiple agencies. By leveraging a single, unified platform, West Virginia can streamline operations, reduce costs, and deliver a better experience for citizens, employees, and businesses. Not only can Salesforce fulfill all of West Virginia's current permitting, licensing, and inspection needs, but its adaptable architecture also ensures it can support **incremental modernization** across all future permitting processes. We are committed to helping the state achieve its vision of a modern, efficient, and interconnected One-Stop Shop Permitting Program.

## Modernizing Regulations with Salesforce's Run, Optimize, Innovate Approach

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In today's dynamic and evolving government environment, maximizing the full potential of Salesforce can significantly enhance **West Virginia's efficiency and timeliness in issuing permits**. Salesforce enables departments and agencies to not only (1) run the mission, but also (2) optimize program or service delivery, and (3) innovate the way routine and time-consuming tasks are handled.

ie: Salesforce has the tools departments and agencies need to (1) manage mission-critical work, (2) enhance systems and processes, or (3) transform how processes run and/or how teams work in order to harness leading-edge opportunities – whatever step you and your team might be looking to tackle next as you evaluate where you are at with respect to your [Minimum Functional model requirements](#).

All three steps are built on Salesforce's Public Sector Solutions (PSS). PSS is a set of purpose-built, reusable, low-code solutions that are designed to help government, educational, and non-profit organizations digitally transform by enhancing efficiency, transparency, and citizen engagement – including case management tools that have been configured to fit the unique needs of permitting offices out-of-the-box. Its modular design can be tailored to fit various scenarios (for example: noting when a milestone has been met with elected officials vs. the general public, as the key message might differ **based on the audience**). Composable application flows or composable “applications” are built by combining smaller, independent building blocks or modules to create the foundation for larger, more complex systems like supporting advanced case management tools, integrating GIS, fueling AI, and more. Further, you can modernize your existing permitting system incrementally using Salesforce Public Sector Solutions. The data model in Salesforce Public Sector Solutions is designed for government permitting agencies, allowing for the definition of regulatory agencies, authorization types, and codes, and can be extended to encompass the National Environmental Policy Act (NEPA) taxonomy and data standards. For more details on the mapping from NEPA to Public Sector Solutions Data Model refer to the [Appendix](#).

PSS' API-led data model enables it to integrate with third-party, homegrown, and legacy IT systems, consolidating data sets so that teams are working with one view, cross-functionally and cross-agency. Its inherent flexibility enables system admins to reflect changing mission demands with just a handful of clicks, no custom coding required. This enhances agility, efficiency, and effectiveness, allowing organizations to issue permits on time, on plan, and on budget.





### Why Salesforce?

Salesforce is uniquely positioned in the market to provide the government with a permitting platform.

We not only consolidate data sets and streamline the many processes involved in issuing a permit but also orient that all around the customer. This customer centric approach ties your program workflows directly to your constituents, removing splintered visibility and fragmented experiences. This design offers you a commercial-grade experience, giving your teams the foundation they need to focus on the permitting process. Not on becoming overnight cloud architecture experts who suddenly find themselves having to piece together on-premises solutions or map ITSM models back to the case record when they already have a long enough to-do list.

Salesforce also pushes out updates three times a year, bringing new features, security updates, and infrastructure improvements to your system automatically. This means Salesforce PSS users are always up to date with the latest functionality, again without asking your system admins to stay on top of technology trends, install patches, staff a data center, or lose their sense of focus to scope creep. Salesforce manages that work for you, maintaining the lowest possible barrier to entry and fastest time-to-value.

Last but not least, Salesforce has years of expertise in case management. We have been recognized as an industry leader by Gartner for the [CRM Customer Engagement for the 15th time in a row](#), the category that covers service and case management technology, which is the foundation for any permitting process. This expertise is extended further by the **Salesforce AppExchange**. The Salesforce AppExchange is a marketplace or online catalogue where the Salesforce ecosystem (our employees, customers, technology partners, etc.) can upload applications and solutions they have built on the Salesforce Platform to support a given mission for others to then download and run across their own programs. These give teams the same reusable structure and future-ready data models that have been built into the core of Salesforce Public Sector Solutions, with a layer of "clicks, not code" configurations that customize the solution to fit a niche-need like a Licensing and Permitting Bot Template to enable your customer base to self-serve their top license and permit needs or an ESRI GIS Geospatial Accelerator that uses ESRI Leaflet to allow applications to view reserved areas and draw a polygon of the requested location and allow reviewers to view submitted polygon area and approve or alter the requested location.

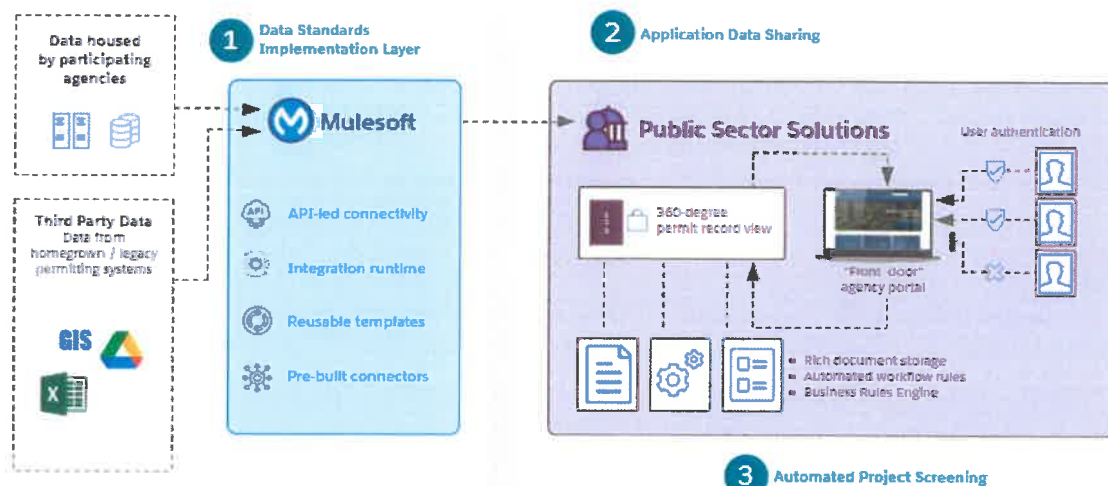
**NEW!** The Salesforce **AgentExchange** is a marketplace for Agentforce, their digital labor platform. **AgentExchange** allows partners and developers to build and sell AI components like actions, templates, and topics. It features over 200 partners and hundreds of pre-built solutions to help businesses create and deploy AI agents. The platform aims to expand the capabilities of Agentforce and participate in the digital labor market.

## Run: Consolidate Programs and Unlock Operational Excellence

The Public Sector Solutions (PSS) Permit Management solution helps you run your permitting office by implementing a set of data standards that are shared across authorized teams from any agency working on an application. Built in workflow rules and advanced document management capabilities give teams the tools they need to automate project screening as they work the application.

Here is how.





### PSS Permit Management - Run

#### 1. Data Standards Implementation Layer

Leading-edge, best-in-class PSS deployments actually start with MuleSoft.

Organizations involved in the typical permitting process - government agencies, research teams, or partners from the private sector - have a plethora of data housed in third-party systems, homegrown solutions, on-prem/legacy IT solutions, and more. **MuleSoft** enables the integration of various systems, including SaaS applications like ESRI, SAP, Marketo, and Microsoft Dynamics 365, as well as cloud services like Amazon Kinesis and Azure Data Lake Storage. Pre-built connectors from MuleSoft's Anypoint Exchange speed up the integration process significantly (think: less time waiting for the page to load or the wheel to stop spinning on your screen), while automated data flows further streamline these processes with minimal coding.

The result: Automating the process of reading and writing fully standards-aligned data without the need for manual intervention, such as downloading email attachments, uploading spreadsheets, or entering data in manually.

#### 2. Application Data Sharing

This data is then automatically incorporated into the permit's **case record** in PSS, creating a more granular, holistic view of the details behind a particular project. Case workers assigned to the permit request can review the information, tag subject matter experts on key questions, and assign next steps.

**Experience Cloud** – an out-of-the-box web-based portal available as a part of PSS, provides permit offices a single front door: authorized users from any agency or organization involved in the permit review process can log-in via their profile, comment on findings or next steps (such as noting how high the risk level might be after reviewing the results of a land survey), check on status, browse self-help articles, upload documentation, and more. Case record updates are reflected in the portal automatically, and case managers are alerted of new document uploads or other updates from the portal via push notifications, giving everyone involved in the project a real-time view of the work at hand.

Together, these capabilities allow incident managers, investigators, and caseworkers to review and add detail to the case record and work as one team to close the case and (hopefully!) issue the permit that much faster.

### 3. Automated Project Screening

Case workers can upload documents directly to the case record just as easily as their counterparts can via the online portal. Using the **Files** object within PSS, case workers can upload text files, Word docs, spreadsheets, photos, PDFs, audio/video files, and any other file type an environmental assessment or impact statement might come in and then store in the case record. Automatically generate documents, Optical Character Recognition (OCR) documentation scanning pulling real-time data together into predefined templates with the click of your mouse. Centralize data-rich files in a digital folder/file cabinet instead scattering them across emails, drive folders, or external drives. This not only leads to greater efficiency but also gives teams the information they need when reviewing a permit inquiry and checking for gaps against categorical exclusions, legal guidelines, or other decision frameworks.

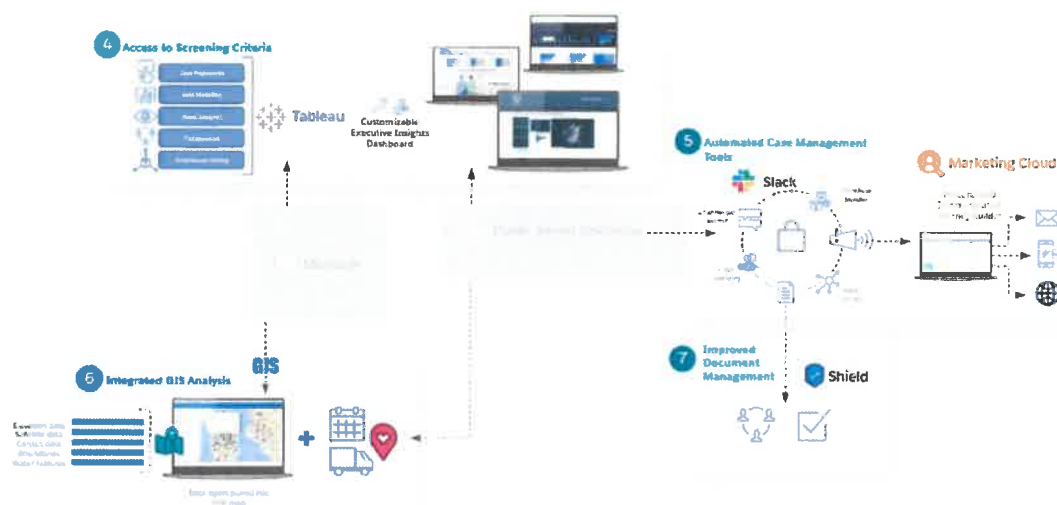
PSS allows you to automate both complex decision-making through a **Business Rules Engine** and leverage **automated workflow rules** using predefined criteria to screen the application or inquiry, determine appropriate action, and route it to a queue (such as an authorization queue or review board) accordingly based on permit type, status, or other form fields. Specifically, the **Business Rules Engine** uses advanced “if this, then that” expression sets that guide users through a process, serving up a field based on the answer to the previous question with the ability to reference lookup tables. Both types of workflow automations minimize errors or incomplete information, flag discrepancies or mismatches, and give staff the tools they need to accelerate the screening process.

Embedded workflow allows system admins to create dynamic guided forms that people can access via public portals to complete applications to apply for permits. These forms can be adapted based on input of users, which streamlines the application process. Users can apply for permits, track their application status, and receive notifications about updates.

All of this is available with MuleSoft and Salesforce Public Sector Solutions.

### Optimize: Refine, Reconfigure, and Re-deploy

Once your permit office is running smoothly, integrated screening criteria tools, automated case management tools, GIS analysis tools, and improved document management tools help teams refine their processes, fine-tune operations, and do more with their limited resources.



**PSS Permit Management - Optimize**



#### 4. Access to screening criteria

**TableauNext** (AI-enriched analytics in the cloud vs. on-premises) pulls data from Salesforce and third-party systems into a set of highly visualized reports and dashboards. Think: colors, a variety of graph types, maps, and more that help a mission-owner understand the information presented at the speed of an executive, with the depth of a data analyst in real-time. This gives permitting teams the insights they need to do things like:

- Report on a permit's progress
- Pinpoint any catalysts or roadblocks that are impacting timelines.
- Break it down by region/congressional district.
- Surface patterns or trends that inform SLAs.
- Ground the decision-making process and communications efforts with data-driven insights and proof points.

The result: easier, comparative project screening, faster reviews, more transparency, and greater accountability.

#### 5. Automated case management tools

Adding real-time collaboration tools that empower people to solve problems (vs. escalate to their supervisor) requires an interoperable case management system. **Slack** enhances case management by offering the following:

- **Automation:** Get real-time updates, strategize on opportunities, and edit records, all in a channel for collaboration that lives in both Salesforce and Slack. Slack's Workflow Builder helps teams streamline processes, enhance collaboration, and boost productivity. With automated tasks and seamless integrations (like push notifications for a supervisor to review and verify a land survey), Slack helps teams focus more on the work and less on administration.
- **Group collaboration channels:** Spin up and spin down group conversations by permit project, region, task force, and more. Swarm cases as needed, turning chaos into coordinated action.
- **Cross-functional collaboration:** Extend channel access to stakeholders and working team members organizations from other agencies, partnering with you to review and qualify a permit.
- **Permission-based access:** Set permissions by channel so that updates and announcements can be broadcast out in the right places, while more specific news can be shared with individuals on a need-to-know basis.
- **Content summaries:** Schedule for Slack to post a summary of conversations, noteworthy updates, and next steps that occurred in a channel over a specified timeframe, at a specified frequency.

What this means for permitting offices specifically:

- **Focused execution:** Automation capabilities give teams the ability to focus on the mission-critical work, not the clerical work that comes with it.
- **Integration Capabilities:** Slack offers extensive integration options with a wide range of third-party applications. This allows for seamless workflows and enhanced productivity by bringing various tools, which might house everything from topography maps to water rights, to local legislation, into one platform.
- **Asynchronous Communication:** Slack excels in facilitating asynchronous communication, which is crucial for teams working from desks, field offices (if not the literal field itself), and HQ. It allows users to catch up on conversations and updates at their convenience, reducing the need for real-time meetings.



- **Customizability:** Users determine which conversations they want to be notified of right away, and which conversations are more suited for recaps or readouts by identifying key words, setting frequency preferences, and more, helping everyone maintain focus, work more efficiently, and be more productive
- **Community and Ecosystem:** Slack has a strong community and a rich ecosystem of apps and integrations, which continuously evolve to meet the needs of its users. For example: rich documents can be attached and downloaded just like they would over email. Permissions from online platforms like Google Drive are carried through the IM window automatically.

**GovSlack** is a specialized version of Slack tailored to meet the stringent security and compliance requirements of government agencies. It delivers all of the above, along with:

- **Compliance:** Meets government standards for security and data protection, such as FedRAMP and DoD IL4.
- **Data Residency:** Ensures data is stored within specific geographic locations to comply with government regulations.
- **Enhanced Security:** Provides additional security features to protect sensitive government information.
- **Dedicated Support:** Offers specialized support for government agencies to ensure compliance and security needs are met.

A case moves faster, and a permit is issued sooner when Public Affairs, the Program Office, and the Office of Communications are working in sync to help the public understand the value, potential impact, and meaningful progress the project brings to the community. Communication tools integrated into the permit management platform help you do this in a streamlined manner.

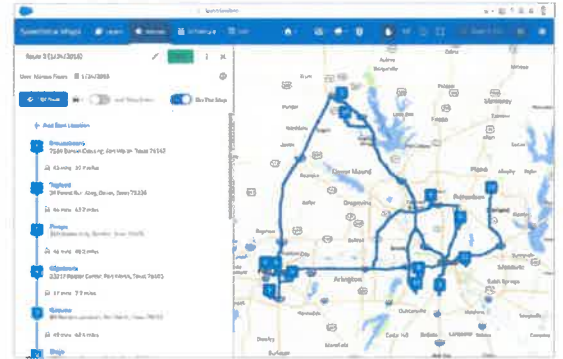
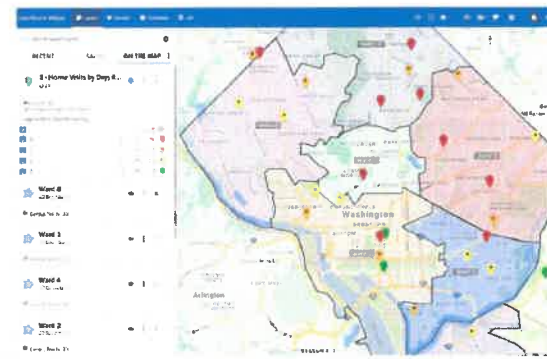
**Marketing Cloud** gives permit offices the tools to manage outreach and engagement by creating custom journeys across email, SMS, and website ad campaigns that provide working teams, supervisors, elected officials, constituents, and others with proactive information on the value projects will bring to the community. These journeys can also be designed to share progress reports on a specific project, emergency alerts, or other critical information to keep people informed. In other words: noteworthy events, milestones, and metrics can all be pulled from the platform into communication streams. Marketing Cloud can be associated with the contact records object, linking communications to the permit case record. No exporting email addresses and then setting them up as a scheduled email blast in another system required.

In other words: bring Public Affairs, Office of Communications, and the Program Office together and align on a communication strategy, eliminating silos and duplication, and provide a more connected experience for your team and the public.

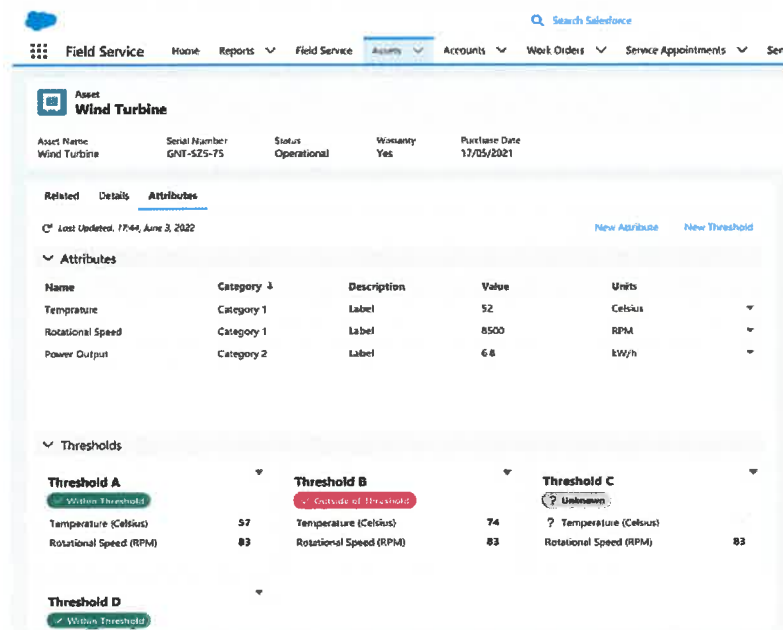
## 6. Integrated GIS Analysis

**MuleSoft's ESRI integration** helps to quickly assess the impact of new infrastructure projects. Automated workflows can flag intersections between proposed projects and sensitive areas, ensuring thorough review and compliance. For example, ESRI's mapping tools overlay project locations on maps with layers for historic homes and endangered species, offering a clear visual of potential impacts.

**Salesforce Maps** offers geospatial tools to visualize project sites by data layering environmental data, demographic data, property lines, and Census data, and more all into one, map-based view. This modern GIS interface enables permit teams to click on a project located on the map and open its case record from that view. Visualizing key info on maps helps spot permit issues early, leading to better design and site specificity.



**Salesforce Field Service** further enhances spatial data visualization and analysis, this time helping to more efficiently manage operations by putting permits, assets, and activities to a map. This gives teams the location-based visibility they need to perform tasks like optimize route scheduling for field technicians or identify high-demand areas for resource allocation.



**Monitor asset performance and initiate proactive measures based on real-time conditions with Asset Service Management**

## 7. Improved Document Management

**Shield**, one of the platform-level services available from Salesforce, offers data security tools that can be especially applicable to document management best practices. **Platform encryption** gives system admins the ability to select which data fields are encrypted and which ones are not, meaning your teams can mitigate which data sets are more likely to end up in a document and which ones are not. **Event Monitoring** alerts administrators if there is an unusually large data download or export so that they can investigate accordingly – again, before it ends up in a



spreadsheet. **Field audit trail** tracks data retention and audit requirements. Additionally, **Salesforce Backup & Recover and Archive** are crucial for data management and protection; Salesforce Backup & Recover provide regular and automatic backups, and quick restoration in case of data loss of permit data. Archive stores expired or unused records in a low-cost external data store, improving system performance and reducing data bloat.

This is in addition to the rich document management tools and capabilities available with core PSS as outlined in **3 - Automated Project Screening**, (Document Checklist Items, Document Generation, Intelligent Document Reader/OCR scan) and the automated collaboration capabilities outlined in **5 - Automated case management tools**.

#### Additional optimization considerations

Changing permitting objectives will eventually require departments and agencies to optimize their programs and processes.

Some permitting missions have clear and predictable seasonality to them. Think: permits for pesticide application can be seasonal as driven by pest activity patterns and crop cycles, environmental permits may require biological surveys to be conducted during specific times of the year when a species is present and active in local waters, and so on. Other times, permitting offices are asked to adhere to a change in budget or policy, activities easily happen year round and often with little-to-no notice.

PSS' agile design enables permit mission owners to add users as needed, creating profiles once via standard templates that then be turned off until the next season hits. No need to set up seasonal staff like you would a net-new user every spring. PSS' configurable nature enables teams to take actions like add options to a field's picklist, incorporate new requirements into workflow rule checkpoints, add steps or conditional questions to application forms, delete fields, and more—all with just a few clicks. No need to write lines of additional code every time there is a change in budget priorities, an adjustment to a policy, or a new Executive Order signed.

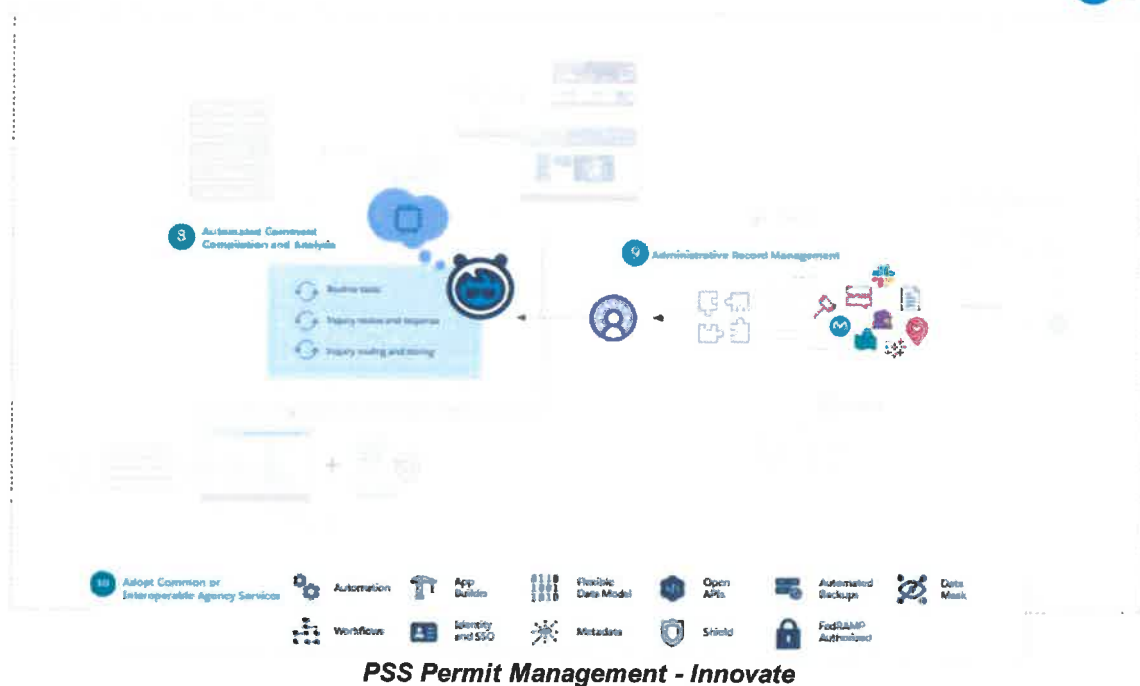
Optimize your PSS permitting foundation with these additional capabilities:

- Tableau
- Slack/GovSlack and Marketing Cloud
- Salesforce Maps and Field Service
- MuleSoft
- Salesforce Shield

## Innovate: Driving Transformation and Future Readiness

Once you have consolidated programs, and you are running your permit office and optimized processes accordingly, it is time to look ahead to what is next—the improvements that are truly transformational.

These days, truly transformational innovation is all about AI, how it unlocks efficiency, and how it improves productivity across the permit lifecycle. And Salesforce has the tools to bring AI agents to life.



## 8. Automated Comment Compilation and Analysis

By leveraging autonomous AI agents, **Agentforce** handles routine, time consuming tasks. Think: scheduling an inspection or commenting on where an application is in the review process. AI agents also can assist with comment analysis, reviewing inquiries and responding as appropriate, (such as retrieving and identifying what legal code might be relevant to the question) and storing the exchanges as required by data record compliance standards. This frees up humans to focus on the more in-depth requests that require more advanced decision making or judgment calls.

In an easy to use interface using natural language, workgroups can define, add, or adjust topics (sets the permissible scope), actions (tools or tasks the agent is allowed to perform), and instructions (guidelines or guardrails that allow or limit decision making based on context from **Agentforce's Large Language Model**), as needed, enabling you to train your virtual staff to adapt to new directives or regulatory requirements just like you do with your human staff. This can be used to analyze information and rich documents, compare and consult multiple files and types all at once, summarize findings, and produce an output faster than a human could ever compute.

Agentforce is your workforce productivity multiplier. In addition, Agentforce is FedRAMP High authorized and available in Government Cloud Plus.

As one simple example of the value Agentforce can provide, see this example demonstration of [AI Retriever](#) leveraged in the context of a licensing use case to expedite the Document Completeness review process.

## 9. Administrative Record Management

**Data Cloud** unifies data sources, harmonizing siloed data for Agentforce to evaluate. Grounding Agentforce in an agency's specific permitting data, policies, and historical decisions via Data Cloud allows Agentforce to generate highly accurate, compliant, and defensible responses, streamlining complex permitting processes and avoid the "hallucinations" or generic advice that can arise from an ungrounded LLM. While a basic LLM can generate responses based on its vast training data, it lacks real-time, accurate, and context-specific knowledge of an agency's unique operational nuances. Data Cloud, on the other hand, provides a secure, unified, and continuously



updated repository of an agency's proprietary information. The result is an Agent that acts as an intelligent, agency-specific expert, rather than just a general knowledge base.

Data Cloud provides a powerful solution for government agencies to break down data silos and create a single, unified view of a constituent. By integrating data across different state agencies and various backend systems, Data Cloud can consolidate fragmented information—such as licenses, permits, inspections (LPI), and other regulatory data—into a single, comprehensive LPI view. This unified profile allows state employees to access a complete history of a business or constituent's interactions, applications, and compliance records, enabling faster, more informed decision-making and a more seamless experience for citizens. This eliminates the need for manual data reconciliation and ensures that every agency is working with the most current and accurate information.

#### 10. Adopt Common or Interoperable Agency Services

All functionality is available on **one, API-led, deeply unified digital platform** that supports your entire permitting office with platform-level services, purpose-built applications, and reusable templates that accelerate time-to-value and time-to-innovation.

Built on Salesforce, PSS Permitting meets **strict data security regulations**. Government Cloud offerings are FedRAMP authorized. All new features can be tested in a Sandbox environment before being pushed out to users, allowing agencies to build and pilot capabilities without taking the Permit Management solution offline. Tools such as Salesforce Optimizer – which can provide recommendations to improve feature usage, clean up customizations, reduce complexity, and drive feature adoption – provide valuable insights and recommendations for identifying additional areas of improvement.

Continually innovate on top of your PSS permitting foundation with these additional capabilities:

- Agentforce
- Data Cloud

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#### Today's CEOs are the last to lead all-human workforces.

Integrating AI-driven digital labor is now a skill separating businesses that thrive from those falling behind.

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Salesforce PSS Permit Management users are uniquely positioned to take advantage of these innovations because high-quality, consistent data is the backbone of any successful AI project.

1. AI-generated recommendations are only as effective as the data that fuels them; the more information being analyzed; **the more statistically significant AI's findings will be.** And building that kind of volume takes time, which means departments and agencies using Permit Management are more likely to have a stockpile of digital, accessible data that would otherwise be lost in offline



spreadsheets or unusable in paper forms.

2. With more data comes holistic context and deeper insights, which gives program owners, mission leaders, Congress, and the public a better understanding of the needs of a constituent group, the work at hand, or the progress made. AI can analyze applications, provide findings, and comment on insights, making it easier for users to speak to real results—but it needs data sets brought together in a standard format in order to do that. Thus, Permit Management users are not just leapfrogging the work, but also setting teams up for success.
3. The more AI is called upon, the more it learns subtle differences or preferences around what users might have expected as a result. Therefore, having AI deployed across a workflow model that is centered around the type of permit or application—not around an internal process or org structure as is the case with many homegrown solutions, ITSM platforms, or on-premises systems—the more likely the results will be relevant, and therefore useful and impactful.
4. AppExchange and AgentExchange are pivotal platforms within the Salesforce ecosystem, offering a vast array of applications and AI agents that can be seamlessly integrated into your Salesforce environment. AppExchange provides a marketplace for third-party applications that enhance Salesforce's core functionalities, while AgentExchange focuses on AI-driven agents that automate and optimize processes. By leveraging these platforms, **West Virginia** can rapidly deploy innovative solutions tailored to their specific needs, establishing a robust foundation for their AI projects. This integration empowers organizations to enhance efficiency, drive customer success, and stay ahead in the competitive landscape.

#### **Unlock AI Excellence with Salesforce PSS Permit Management**

**Harness the power of high-quality, consistent data to drive impactful AI-generated recommendations. Integrate seamlessly with AppExchange and AgentExchange to deploy innovative solutions, enhancing efficiency and driving customer success.**

## **Response to RFI Requirements**

### **3.2. Specific Questions**

3.2.1. Please describe your ability and methodology to establish the One-Stop-Shop permitting solution.

Salesforce is best positioned to deliver on the WV DOA's One-Stop-Shop permitting vision by providing the only enterprise, cloud native, low-code platform with out-of-the-box functionality to support permitting, licensing and inspection requirements for State government. This is further supported with the leading Customer Relationship Management (CRM) and Artificial Intelligence (AI) technology, which will be critical to not only meet the needs of the WV requirements but the vision to implement a single online destination that will enable constituents, individuals, and business partners to locate services and conduct business with the WV DOA, even if they do not know which agency to contact. Salesforce - Public Sector Solutions (PSS) and our Licensing, Permitting and Inspections (LPI) application, which incorporates the best practices and industry standards for the purposes of permitting, licensing, and certifications. Salesforce PSS is built on Salesforce's industry-leading enterprise low-code platform - designed to facilitate rapid application development, workflow, integration, reporting, and agile response to new and changing requirements - coupled with decades of investment in the industry-leading CRM solution - designed to modernize the customer engagement, streamline processing, and maximize automation.





One of the primary functions of License, Permit, and Inspection Management is to facilitate the application and approval process regardless of the agency or department. Applicants can submit their requests online, track the status of their applications in real-time, and receive notifications about any required actions or updates. This not only enhances transparency but also significantly reduces the time and effort required for both applicants and administrators.

In addition to application management, the product offers robust inspection scheduling and tracking capabilities. Inspectors can access their schedules, record inspection results, and generate reports directly from the field using mobile devices. This ensures that inspections are conducted promptly, and that all relevant data is captured accurately and efficiently.

This solution provides a "one stop shop" by deflecting standard support requests through an online portal, with License and Permit Management, regulatory organizations can:

- **Digitize the citizens' experience.** Launch a single portal to support everything from service requests to application updates, fee payments, renewals, or simply updating license information.
- **Streamline the application process.** Reduce time tax on everyone with smart forms, intelligent checklists, and guided next steps. Streamline the process of managing licenses and permits, making it easier to track and manage all necessary documentation.
- **Track Compliance.** Ensure compliance with regulations by providing a clear record of all licenses and permits, including when they were issued, when they expire, and any associated conditions or restrictions.
- **Deploy faster.** Unlock digital licensing and permitting services faster with a pre-built data model, templates, workflows, and analytics built for the government.
- **Automate application processing.** Automate application reviews with a flexible, no code business rules engine. Send reminders when a license or permit is about to expire.
- **Reduce errors.** Help applicants find, apply, and check status for all licensing and permitting requirements. Implement prescreening to help them fill out the right application, every time.

### 3.2.2 Provide examples of previous similar work products.

Organizations around the globe are leveraging Salesforce's leading cloud solutions and experiencing incredible results ranging from more connected customer service to streamlined operations, better performance, and overall cost savings. Below are several representative customer success stories.

**The Rhode Island Department of Environmental Management (DEM)** has launched a new online portal ([dem.ri.gov/dafe-portal](https://dem.ri.gov/dafe-portal)) for its Division of Agriculture and Forest Environment (DAFE). This "one-stop shop" simplifies and modernizes the submission and issuance of regulatory and professional licenses and permits for various businesses, including farmers, arborists, and animal shelters.

DEM aims to support small businesses by making the licensing process quicker and easier. Ken Ayars, DAFE Chief, stated that the online portal will improve customer service and streamline staff time.

Processing over 30,000 applications annually, DAFE's new system consolidates previously paper-based applications into a secure online portal. Customers can now submit, track, and monitor applications in real-time, pay fees, and save information for renewals.

DEM partnered with a Salesforce partner to develop the portal using Salesforce Public Sector Solutions. This aligns with DEM's FY2024-2026 Strategic Plan to improve customer service. Staff training will be provided for a smooth transition.





DAFE works to sustain Rhode Island's agricultural viability and promote healthy forests, assisting local farmers and fishers, supporting animal health programs, and managing forests to benefit all Rhode Islanders.

**Indiana Bureau of Motor Vehicles (BMV)** is responsible for registering every vehicle and licensing all drivers in the state of Indiana. Previously communicating with Indiana drivers via paper notifications was a time-intensive, costly proposition. The Indiana BMV desired a solution that would support their high-volume communications with greater ease and efficiency and less overhead. The Salesforce Marketing Cloud provided the solution to the Indiana BMV's cost and communications needs. With Email Automation, the Indiana BMV has developed a digital customer journey that guides users through the vehicle registration and licensing process, as well as providing agency updates and special offers. The Indiana BMV's digital solution lets them acquire, onboard, engage, and retain customers with automated campaigns that keep customers informed and up to date. By investing in the Salesforce Marketing Cloud and automating their emails, the Indiana BMV has seen measurable success. In 10 months, the BMV saved \$133,000 with customers opting in to digital communications and eliminating paper waste.

The **Wisconsin Department of Safety and Professional Services (DSPS)** needed a simplified, user-friendly environment that initiated and supported a process that was self-guided, easy to use, efficient and durable. And it needed to be scalable to service the needs of Wisconsin citizens today and in the future. The DSPS needed to modernize their own operations and meet people where they are at and where they expect to do business: online, in the cloud.

The team deployed an occupational licensing system using the [Licensing, Permitting, and Inspections app](#) on the FedRAMP-authorized [Salesforce Customer 360 Platform for Government](#). The self-guided application and renewal platform will also replace paper application forms and previous renewal tools.

By enabling more customer service-oriented tasks, the system has helped to not only balance work internally, but it also makes sure tasks are in the right place with the right person, at the right time. The automation of these tasks allows staff to focus on evaluation and decision making, which is ultimately more meaningful work for them and a better use of their time and expertise.

The data can help the state tap into federal funding available to support the expansion of care in designated [Health Professional Shortage Areas](#).

The **New Mexico Regulation and Licensing Department** digitally transformed their licensing and permitting processes and systems to bridge silos, work cross-functionally, and create a single source of truth for all of New Mexico's licenses. The team was able to create a comprehensive document repository where both the NM RLD team and its customers can log in and see their information from any board or organization all in one spot.

The team platformed a licensing system to enable them with the tools to offer a single, consistent way for customers and staff members alike to access license documentation on the front end without compromising the ability to configure workflows to fit program-specific needs on the back end. The team has pushed an omnichannel approach through omni studio and license type so they can grow their system with their business needs as they change and fluctuate. The flexibility allows the team to make decisions in real-time and continually update to stay current with state regulation and license requirements.

The team launched a digital licensing system on Salesforce's Licensing, Permitting, and Inspections (LPI) application, a purpose-built solution on the FedRAMP-authorized Salesforce Government Cloud Plus platform. It gives them the tools they need to offer a single, consistent way for customers and staff members alike to access license documentation on the front end without compromising the ability to configure workflows to fit program-specific needs on the back end.

Results:



The team received about 1,100 applications to process, amounting to roughly \$51,000 in revenue. The system managed over 720 approvals, amounting to roughly \$126,000 in revenue. Service delivery time was reduced from 4 hours to 15 minutes. The team generated \$177,000 in revenue in one month.

**Arizona Registrar of Contractors (AzROC)** - AzROC currently issues over 43,000 licenses to construction companies and investigates roughly 7,000 claims per year. AZROC launched its automated, digital license management system built on the FedRAMP-authorized Salesforce Platform. The solution provides their customers with 24-7 online access to submit a license request, initiate an investigation, or update their credentials. The information submitted through the system is captured in a profile-like setting, giving AZROC a 360-degree view of the customer request.

AZROC launched its licensing, renewals, and investigations solution on the FedRAMP-authorized Salesforce Platform. It is an automated, digital case management system that guides customers through the various steps and forms required to obtain a license, initiate an investigation, or update their credentials.

The Platform's configuration capabilities also helped support AzROC's three-fold process covering its major operations – accounting, compliance, legal, and licensing -- allowing the team to offer a consistent user experience on the front end without having to sacrifice the necessary program-specific workflows on the backend. APIs share information between departments, and push notifications alert staff of new action items. Insights and best practices from the [Salesforce AppExchange marketplace](#) accelerated design and deployment time even more.

**Victorian Asbestos Eradication Agency (VAEA)** - The [Victorian Asbestos Eradication Agency](#) has transformed how it manages and eradicates asbestos by deploying **AIRSystem**, a cloud-based reporting platform built on Salesforce. This solution replaces scattered, manual records with a **centralized, comprehensive database** accessible to government agencies, hospitals, and other stakeholders. Integrated with **Einstein Analytics**, the system provides data-driven insights and interactive dashboards that enable these organizations to make informed decisions about asbestos removal and management. By making data readily available and secure, AIRSystem is helping VAEA to streamline operations, reduce health risks, and advance its mission of creating safer workplaces and communities across Victoria.

**City and County of Denver (CCD)** - The [City and County of Denver](#) used **MuleSoft's Anypoint Platform** to connect its more than 50 agencies and modernize government services. By replacing its outdated Oracle system with an **API-led integration approach**, the CCD team was able to launch new projects twice as fast and reuse 36% of its APIs, creating a more efficient and agile workflow. This transformation enabled the city to build a single, self-service portal for residents to access services like licensing and permitting and to rapidly deploy a COVID-19 testing solution in just seven days. Ultimately, MuleSoft helped CCD streamline processes for both citizens and government employees, paving the way for a more innovative, digital-first government.

**Wyoming Office of State Lands and Investments (WY OSLI)** - The [Wyoming Office of State Lands and Investments](#) modernized its operations and became a trailblazer for other states by replacing its paper-based system with the **Surface Land Asset Management System (SLAMS)**, a cloud-based application library. This integrated solution provides a centralized, flexible platform for managing the state's 7.3 million acres of trust land, which generates revenue for public schools. By using purpose-built applications with built-in mobility and native integrations, WY OSLI has not only improved efficiency and consistency but has also fostered a positive cultural shift, enabling staff to better manage resources and relationships. As a result, the agency is now sharing its successful model with other states to help them transform their own land management processes.

**California Department of Motor Vehicles (CA DMV)** - The [California Department of Motor Vehicles](#) has transformed its operations by adopting a **"digital first" strategy** on the Salesforce Customer 360 Platform, making it a model for other public sector organizations. By consolidating services on a single

platform, the DMV has created an **omnichannel experience** for customers, allowing them to complete transactions, like applying for a REAL ID, in minutes rather than hours. The system uses **AI-powered chatbots** to solve common issues, virtual waiting rooms, and **MuleSoft** to connect legacy systems, which has enabled the DMV to efficiently process 60 million transactions annually. This digital transformation has not only improved the customer experience but has also streamlined employee workflows, reduced wait times, and paved the way for innovative programs, such as mobile driver's licenses and the regulation of autonomous vehicles.

### 3.2.3. Identify your company name, primary contact person, phone, and email.

Salesforce is a global solution and has locations all around the world. We are headquartered in San Francisco, California in the United States.

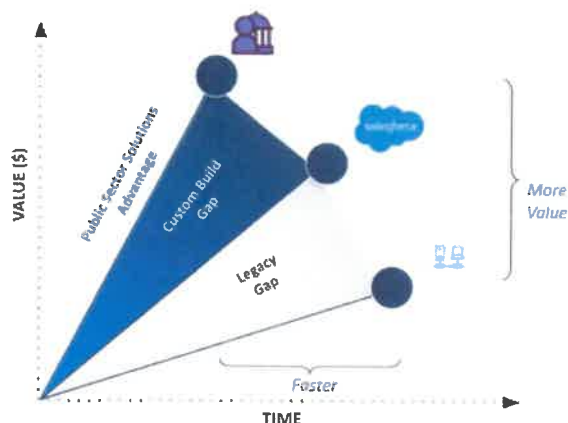
Salesforce Inc.  
415 Mission Street, 3rd Floor.  
San Francisco, CA 94105

Primary Contact:  
Ryan Willet  
Account Executive  
ryan.willet@salesforce.com  
804-366-9674

### 3.2.4. Describe how your solution would address adding additional permits and licenses for the participating agencies, when necessary, as well as adding additional agencies and their permitting requirements that may come online after the fact.

Salesforce Public Sector Solutions (PSS) provides a robust framework for managing licensing and permitting programs across multiple agencies. Here's how it helps agencies with these processes:

- **Streamlined Workflows:** PSS automates the entire licensing and permitting process, from intake to issuance. Agencies can easily configure regulatory authorities, define various license and permit types, and set up dependencies between different permits to provide clear guidance for applicants.
- **Scalability and Modular Architecture:** Built on the **Industry Common Layer**, PSS offers a scalable solution that can grow with your agency. This allows you to start with core functionalities and seamlessly add new agencies or their unique requirements without disrupting existing workflows. The data model is flexible and supports multiple regulatory authorities and authorization types.
- **Constituent-Centric Approach:** PSS enhances the customer experience with **Experience Cloud** sites. This gives constituents a centralized, easy-to-use portal to apply for permits, track their application status, and manage fees, which improves transparency and reduces administrative burdens.
- **Faster Time to Value & Reduced IT Development Cost:** Reduced upfront



configuration/ customization costs and faster value capture by leveraging Public Sector specific out-of-the-box functionality and processes.

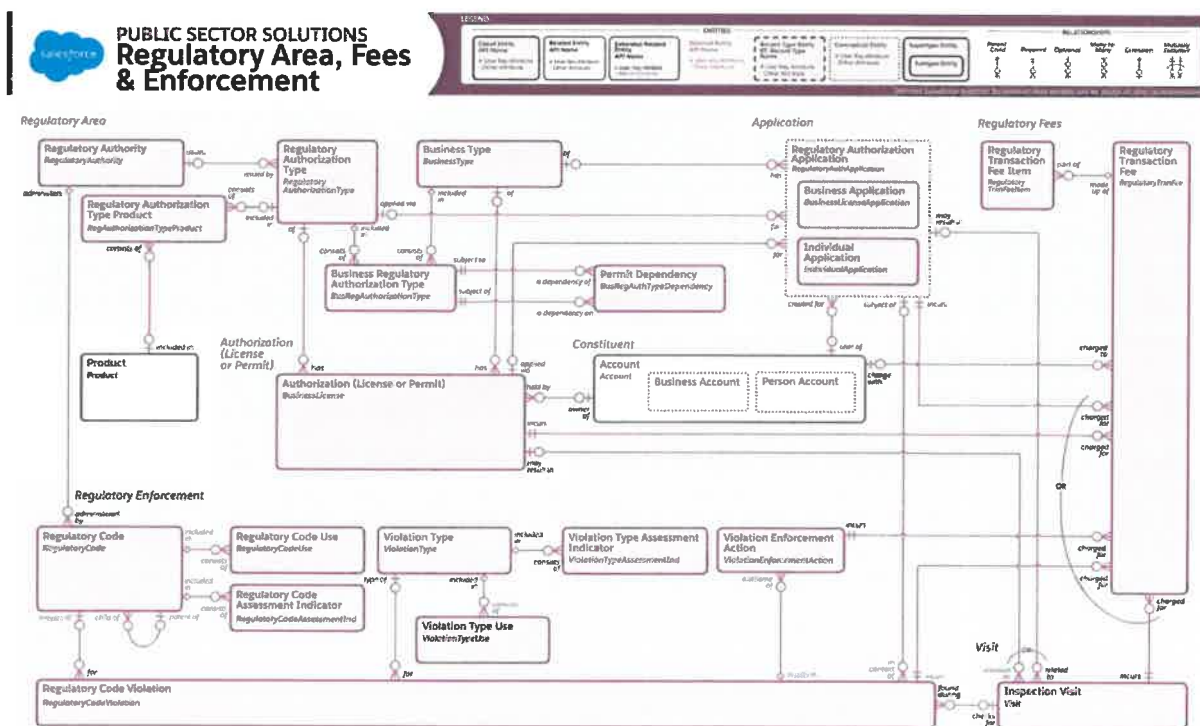
- **Innovation:** Public Sector specific new features and functionality delivered 3x a year
- **Advanced Analytics and Insights:** With PSS, agencies can leverage powerful analytics tools to monitor performance, make data-driven decisions, and improve constituent satisfaction.
- **Pre-Built Use Cases:** The solution's data model and features support a wide range of authorization processes, including those for individuals, businesses, assets, and geolocation-based permits.
- **Enterprise Solution:** PSS is designed to scale from managing a single type of permit to supporting all license and permit types across **West Virginia** on a single platform.

For more detailed guidance, you can explore the following Salesforce resources:

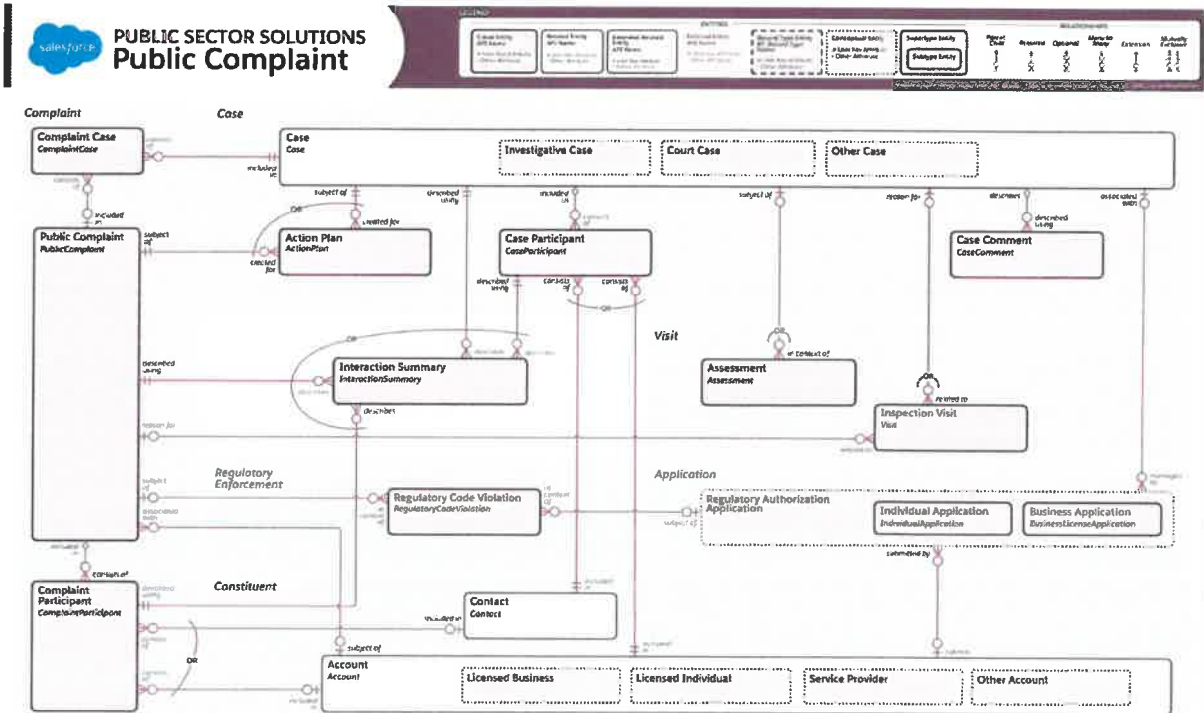
- Discover and Explore Public Sector Solutions
- Licensing and Permitting in Public Sector Solutions
- Get to Know the Industry Common Layer in Public Sector Solutions
- Licensing and Permitting Flows and Components
- Configure Regulatory Authorizations in Public Sector Solutions
- Customer 360 View for LPI Video

**Examples of PSS's purpose built, scalable, and extensible data models below:**

- Regulatory Area, Fees, and Enforcement Data Model

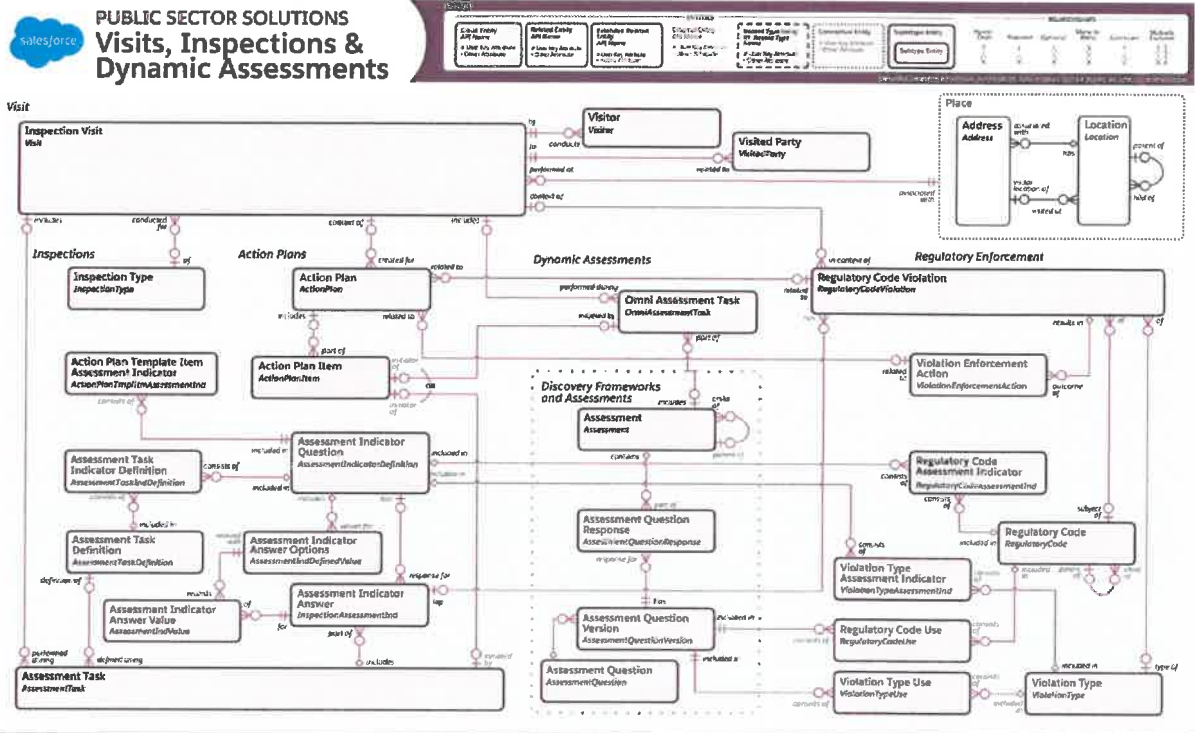


- Public Complaint Data Model



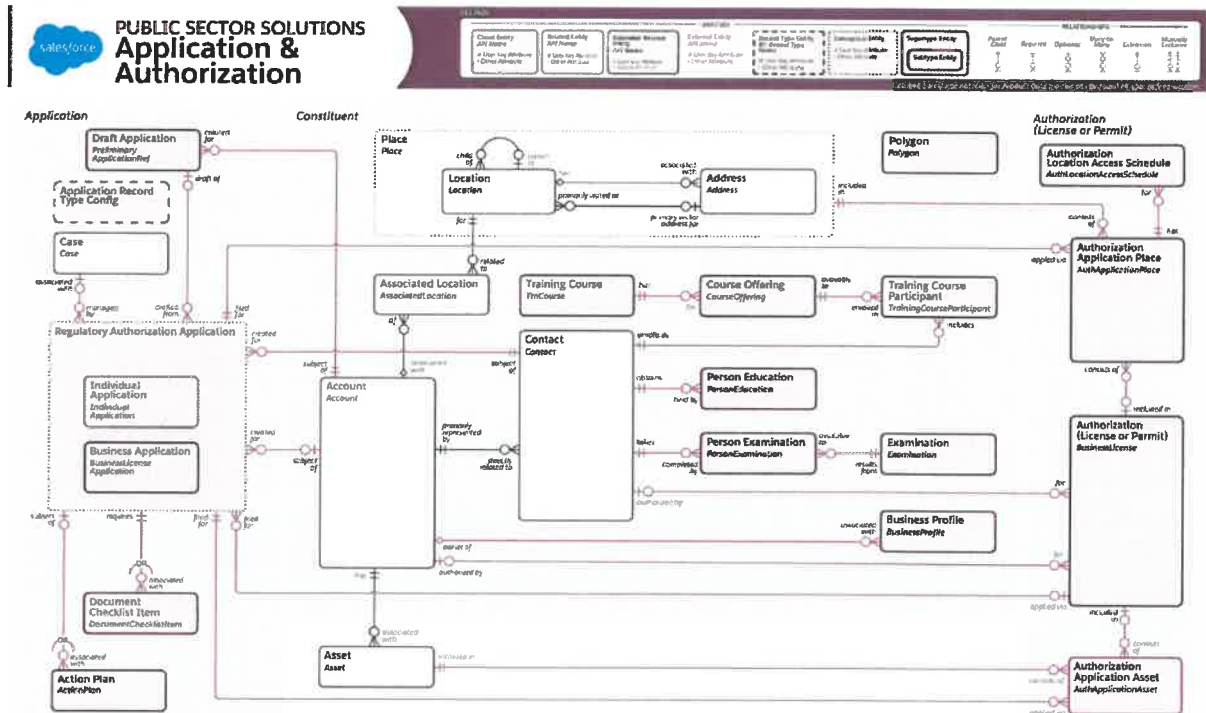


- Visits, Inspections & Dynamic Assessments





- Application and Authorization Data Model



3.2.5. How would you address permitting portals currently in use by state agencies?

Creating a seamless permitting process requires a strong connection between the front-end portal and the back end permitting system. When these two are disconnected, applicants are forced into a fragmented experience. A public-facing portal that is not directly tied to the core system of record often acts as little more than a digital filing cabinet, where submitted applications must be manually downloaded and re-entered by staff. This creates significant friction, as applicants cannot track their application status in real-time, leading to frustration and repeated phone calls to check for updates. For agencies, this manual data entry is a major source of inefficiency, introducing delays and a high potential for errors that can slow down the entire approval process and create a poor experience for both the customer and the agency's employees.

Salesforce addresses these challenges with a unified, end-to-end solution that connects the One-Stop Permitting portal (built on Experience Cloud) directly to the back end permitting system (Public Sector Solutions). This real-time integration eliminates manual data entry and ensures that information flows instantly from the applicant to the core system. As a result, applicants can use the portal to track the exact status of their application at every stage, from submission and review to fee payment and final approval. This transparency not only reduces frustration but also empowers applicants with greater control. For employees, the integrated system streamlines workflows, giving them a single, accurate view of all application details. This allows them to focus on higher-value tasks, like reviewing applications and providing direct support, which leads to faster approvals and a more positive experience for everyone involved.

MuleSoft for Public Sector Solutions provides a robust integration platform tailored to the unique needs of government agencies. MuleSoft enables seamless integration of various applications, data sources, and devices, whether they are on-premises or in the cloud. This platform-as-a-service (iPaaS) solution helps

reduce the infrastructure and management costs associated with legacy systems, allowing IT teams to concentrate on designing and implementing integrations rather than managing infrastructure. MuleSoft connects enterprise apps, data, and devices, across any cloud and on-premises, will accelerate your digital transformations, enabling **West Virginia** to unlock data across legacy systems, cloud apps and devices to make smarter, faster decisions and create highly differentiated, connected experiences.

In addition to Salesforce's core integration capabilities, MuleSoft provides one of the world's leading platforms for building application networks that connect enterprise apps, data and devices, across any cloud and on-premises, accelerates your organization's digital transformation, enabling you to unlock data across legacy systems, cloud apps and devices to make smarter, faster decisions and create highly differentiated, connected customer experiences.

At Salesforce, our mission is to help our customers connect to their customers in a whole new way. We do this by giving them a platform that abstracts away all their complex enterprise systems and helps them build modern experiences that connect every system, every customer, and every device. A core and strategic piece of this is integration, and the foundation of the Salesforce Integration Cloud is MuleSoft. The MuleSoft Anypoint Platform enables more than 2,700 organizations in approximately 60 countries to build application networks and meet the challenges of the digital economy. The MuleSoft Anypoint Platform is a horizontal solution that addresses a broad range of integration and API management use cases.

Common use cases include:

- Pull data from external systems into Salesforce.
- Expose data from existing systems to mobile apps, portals, partners, and customers via APIs.
- Sync data records between cloud applications and on-premises databases.

## Take the Complexity Out of Licensing, Permitting and Inspections



Connect mission-critical data and automate workflows to meet constituent needs faster

### Future-Proof Cloud Migration with APIs

Unlock legacy systems to rapidly surface records, eligibility data, and other information to power cloud solutions that can evolve with constituent needs

### Deliver Digital Constituent Services

Enhance Salesforce Public Sector Solutions for Licensing, Permitting, and Inspections and other cloud-based government services with access to reliable, real-time data

### Streamline Critical LPI Operations

Extend your own APIs to power cross-agency collaboration and automate manual data entry processes to reduce errors



## Unlock GIS Data with MuleSoft Esri Connector



Extend the capabilities of Esri ArcGIS and enable seamless interoperability with third-party SaaS applications, systems, and services

- Pre-packaged Esri integration allows **instant connectivity** to Esri API
- Interface with the Esri API from **within MuleSoft Anypoint Platform**
- Multiple **use cases for LPI, 311 requests, housing, infrastructure, economic restoration, and more**



3.2.6. Describe how you handle security and privacy/cyber security as well as backups and disaster recovery within your solution?

### Security

#### Government Trusted Security and Infrastructure

Salesforce understands that the confidentiality, integrity, and availability of our customers' information are vital to their business operations and Salesforce's own success. Salesforce uses a multi-layered approach to protect that key information, constantly monitoring and improving our application, systems, and processes to meet the growing demands and challenges of security.

Independent audits confirm that our security goes far beyond what most companies have been able to achieve on their own. Using the latest firewall protection, intrusion detection systems, and TLS encryption, Salesforce gives you the peace of mind only a world-class security infrastructure can provide.

#### Third-party Validation

Security is a multidimensional business imperative that demands consideration at multiple levels, from security for applications to physical facilities and network security. In addition to the latest technologies, world-class security requires ongoing adherence to best-practice policies. To ensure this adherence, we continually seek relevant third-party certification, including ISO 27001, the SysTrust audit (the recognized standard for system security). SOC 1, SOC 2, and SOC 3 audits are performed by a third-party auditor annually at a minimum, while FedRAMP and DoD audits are conducted annually.

#### Protection at the Application Level

Salesforce protects customer data by ensuring that only authorized users can access it. Administrators assign data security rules that determine which data users can access. Sharing models define organization-wide defaults and data access based on a role hierarchy. All Customer data is encrypted by default at the volume level and in transit. All access is governed by customer-defined authentication policies with strict requirements for multifactor authentication (MFA). All passwords are stored in SHA 256 one-way hash format. Applications are continually monitored for security violation attempts.

#### Protection at the Facilities Level

Salesforce uses infrastructure provided by Amazon Web Services, Inc. ("AWS") to host Customer Data submitted to the Salesforce Government Cloud Plus Covered Services. AWS monitors their data centers





using their global Security Operations Centers, which are responsible for monitoring, triaging, and executing security programs. They provide 24/7 global support by managing and monitoring data center access activities, equipping local teams and other support teams to respond to security incidents by triaging, consulting, analyzing, and dispatching responses.

For further information, visit <https://aws.amazon.com/compliance/data-center/controls/>.

#### Protection at the Network Level

Multilevel security products from leading security vendors and proven security practices ensure network security. To prevent malicious attacks through unmonitored ports, external firewalls allow only http and https traffic on ports 80 and 443, along with ICMP traffic. Switches ensure that the network complies with the RFC 1918 standard, and address translation technologies to further enhance network security. IDS sensors protect all network segments. Internal software systems are protected by two-factor authentication, along with the extensive use of technology that controls points of entry. All networks are certified through third-party vulnerability assessment programs.

Trust.salesforce.com is the Salesforce community's home for real-time information on system performance and security. On this site you will find:

- Up-to-the minute information on planned maintenance
- Phishing, malicious software, and social engineering threats
- Best security practices for **West Virginia**
- Information on how we safeguard your data.

For more information on the technology that makes the Salesforce Platform fast, scalable, and secure for any type of application visit [Platform Multitenant Architecture](#) and [Trust and Compliance Documentation](#).

At Salesforce, trust is our number one value. Many of our customers operate in regulated industries of financial services, government, military, and, of course, healthcare. Earning the trust of our customers in the healthcare and life sciences industries requires that we address the safeguards and requirements outlined by the HIPAA Security Rule and the PIPEDA guidelines.

#### **HIPAA**

With respect to providing and operating the Salesforce Covered Services, Salesforce complies with the provisions of the HIPAA Security Rule that are required and applicable to it in its capacity as a business associate. In addition, Salesforce also provides customers with customer-controlled security features in the Salesforce Covered Services, which may help HIPAA-regulated Customers address stringent security requirements.

Salesforce's customers are responsible for complying with HIPAA's Privacy Rule and Security and the HITECH Act in their capacity as a covered entity or business associate using the Salesforce services. The services' features permit customers to customize use as per a compliance program for HIPAA (including the HITECH Act) and many customers store protected health information (PHI) on our service in the United States. For customers, Salesforce can assist customers with their compliance obligations; for example, by discussing entering into business associate agreements (BAA) to address formal legal requirements pertaining to use and disclosure of protected health information (PHI). For additional details please see the [HIPAA compliance page](#).

Salesforce's Information Security Management System (ISMS) and information security policies are based on the ISO 27002 framework of best practices and are ISO 27001 certified. Salesforce has comprehensive privacy and security assessments and certifications performed by multiple third parties, including the following Global Audit and Compliance programs:

- ISO 27001
- ISO 27017/27018
- CSA STAR
- SOC 1 Type II (SSAE 18 Report, equivalent to CSAE 3416)
- SOC 2 Type II (Trust Principles Report)
- SOC 3 (formerly SysTrust)





- PCI-DSS
- TRUSTe Certified Privacy Seal

Geographical recognitions include:

- Government of Canada Protected B (PBMM)
- U.S. Department of Defense IL2/IL4
- U.S. FedRAMP (NIST 800-53)
- U.S. HIPAA
- Australia IRAP
- EU-US Privacy Shield
- France ASIP Santé HDS
- Germany C5 (ISAE 3000)
- Germany TÜV Rheinland Certified Cloud Service
- Japan JIPDEC PrivacyMark
- Japan JASA CS Gold Mark
- Netherlands NEN 7510
- UK Cyber Essentials Plus

For independent third-party auditor assessments of the security program and policies (i.e. SOC2, ISO 27001), please refer to the compliance documentation available on Compliance engineered for the Cloud. Attestations of penetration tests and security assessments performed by third parties may be found at External Security Assessments.

From an infrastructure perspective, Salesforce takes an extensive proactive approach to monitoring the services. Some of the measures taken include:

- Having extensive monitoring and instrumentation embedded into the application itself so that the application can accurately report health and performance to system engineers, network operations personnel, QA personnel, and developers.
- Capacity demands (system and application) are monitored daily. Capacity planning engineers monitor network, data center, infrastructure, and application utilization to ensure capacity demands are met, and future requirements are anticipated.
- Testing all code for security vulnerabilities before release and regularly scans our network and systems for vulnerabilities.
- Having technical operations and security personnel monitor vulnerability alerts and patch release notifications from our vendors and other sources. When a patch is released, it is evaluated by the senior technical and management personnel on risk, severity, and mitigation efforts associated with the vulnerability and its associated patch, from which a course of action is prescribed.
- Conducting internal offensive security testing helps to identify potential vulnerabilities and ensure the response teams are prepared to address associated incidents should they arise.
- Operating a private Bug Bounty program. Security researchers are invited to identify and responsibly disclose potential security vulnerabilities to Salesforce.
- Working to incorporate privacy and data protection concepts from the inception of new service or features.
- Conducting disaster recovery testing on a regular basis to ensure the process works effectively should the need arise.
- Maintaining a formal company-wide information security management system (ISMS) that conforms to the requirements of ISO 27001 standard and NIST Cybersecurity Framework (CSF), including security policies, standards, and procedures.



From a reactive infrastructure monitoring perspective, some of the measures taken include:

- The Salesforce application and website are monitored on a 24x7 basis for reliability and performance. Site monitoring and first response are provided by the Site Reliability (SR) team.
- The SR team handles first and second tier support, with Technical Operations personnel providing escalation support.
- Salesforce always has engineers on-call.
- Monitoring tools are automated and route issues, warnings, and problems to SR teams. All significant alerts go to on-call personnel, as well as Technical Operations teams.
- Technical Operations personnel are located globally. Overall system monitoring is provided by a variety of tools. All monitoring alerts are aggregated and monitored by the Site Reliability (SR) team. Alerts such as configuration changes from network devices, server state changes, and other events can be correlated to indicate root cause.
- All network devices, servers, services, and most application processes are monitored from the dedicated monitoring host.
- Salesforce has an incident handling capability for security incidents that includes preparation, detection and analysis, containment, eradication, and recovery.

From an application perspective, there are features customers can use to help them manage their Salesforce application environments both proactively and reactively. These include:

- Using multi factor authentication (MFA) for their users to help reduce the threat of a compromised account and account take over.
- Setting up the standard data sharing model to ensure users only have access to the data they should have access to for their role.
- There are standard auditing features in the application that record, for example, changes to nominated fields and successful and unsuccessful login attempts.
- There are enhanced event logging features that can help customers identify suspicious or malicious activity and prevent it from happening, for example, exfiltrating large amounts of data, or sensitive data, via a report export. (This enhanced option is known as Event Monitoring.)

With Salesforce Government Cloud Plus / Government Cloud Plus - Defense, Salesforce has implemented end-to-end encryption to protect customer information at rest and in transit using FIPS 140-2 validated encryption. By default, Customer Data in transit is encrypted between Salesforce's customers' network(s) and the Salesforce Government Cloud Plus / Government Cloud Plus - Defense authorization boundary, and between the Salesforce Government Cloud Plus sites. Additionally, Customer Data at rest is encrypted by default at the volume level. Salesforce also provides customers with the ability to encrypt their sensitive data at rest at the platform level using Salesforce Classic Encryption or Salesforce Shield Platform Encryption (additional subscription service).

Each of these implementations leverage cryptographic modules that have been specifically validated by Cryptographic Module Validation Program (CMVP) for conformance to the Federal Information Processing Standard (FIPS) Publication 140-2. Those modules are required to operate in FIPS 140 approved mode with approved cryptographic algorithms and key lengths.

### **Backups and Disaster recovery**

Salesforce utilizes one Disaster Recovery process for all customers. For business continuity purposes, Salesforce supports disaster recovery with a dedicated team and a 4-hour recovery point objective (RPO)



and 12-hour recovery time objective (RTO).

Salesforce offers multiple layers of redundancy, so that many failures may be recovered in seconds or minutes. Not all disruptions are declared. Salesforce's RPO number is for when a data center is unavailable. Since data is replicated between data centers, backups are only used should the primary recovery mechanism fail.

To maximize availability, the service is delivered using multiple world-class data centers supporting primary and replicated disaster recovery instances, plus a separate production-class lab facility. The infrastructure utilizes carrier-class components designed to support millions of users. Extensive use of high-availability servers and network technologies, and a carrier-neutral network strategy, help to minimize the risk of single points of failure, and provide a highly resilient environment with maximum uptime and performance.

The Salesforce Services are configured to be N+1 redundant at a minimum, where N is the number of components of a given type needed for the service to operate, and +1 is the redundancy. In many cases, Salesforce has more than one piece of redundant equipment for a given function.

3.2.7. How would you ensure that the solution will be operational by the deadline indicated in the statute and legislative rule?

Salesforce has an extensive network of experienced partners specializing in Licenses, Permits, and Inspections (LPI) solutions, who are well-equipped to meet the state's specific needs and respond to their ability to meet West Virginia's implementation deadlines. To ensure the solution is operational by the statutory and legislative deadline, our partners will leverage Salesforce's pre-built Public Sector Solutions and agile implementation methodology. This approach allows for rapid configuration and deployment, minimizing the need for custom coding and significantly accelerating the timeline to go-live. By building upon a proven, scalable platform, we can meet your requirements efficiently while ensuring compliance with all statute and legislative deadlines.

The system integrator will address this requirement in detail, but it is important to highlight that the underlying data analytics components of the broader solution are critical for successful migration and integration. These components must be data source and type agnostic, capable of coexisting with other technologies.

Further, platforms designed on open frameworks with robust integration capabilities are essential for successful implementations.

Many enterprises adopt a risk management strategy that includes providing technology options to avoid vendor lock-in and meet specific user needs and use cases. Our open frameworks and platforms are user-friendly, agnostic, and adaptable, ensuring they can support any future direction **West Virginia** takes.

**Salesforce Professional Services (SPS)** is a consulting arm within Salesforce that specializes in implementing customized solutions tailored to specific organization needs. SPS focuses on partnering with clients to build and optimize their Salesforce platforms, providing strategic guidance, hands-on expertise, and tailored roadmaps. They offer pre-configured applications known as "Accelerators" for areas such as grants, permitting, contact centers, and case management, which streamline implementation and reduce costs. Specific to permitting, Salesforce offers an industry solution that provides the data model and workflows for permitting and inspections. Leveraging this framework, Salesforce Professional Services can deploy permitting solutions to our customers faster and reliably achieve success by using proven automations. Their services aim to ensure customers maximize the value of their Salesforce investment by providing solutions that drive innovation, efficiency, and competitive advantage.



With a commitment to quality, security, and compliance, SPS leverages a process-driven approach to deliver consistent and effective results. They offer end-to-end accountability backed by Salesforce, providing access to innovation, product teams, and the latest releases. Salesforce Professional Services provide a comprehensive approach to implementation, ensuring accountability and a seamless handover to your internal team. By leveraging their expertise, you can receive engineering support or full implementation services, empowering your team to manage the system independently and effectively. SPS has a team of highly experienced and certified Salesforce experts with extensive technical, business, and industry knowledge. They have a strong track record of success, particularly in the public sector, and emphasize a “configure first” and human-centered design methodology to accelerate time to value and ensure long-term success.

### 3.3. Information Being Sought

3.3.1. Examples of previous solutions of similar size and scope.

Please see our response in section 3.2.2

3.3.2 Please describe pricing strategy options available to address the cost of build out and maintenance of the program, including user fee options.

#### Maintenance

With Salesforce, there is no maintenance necessary, so there are no annual maintenance or support costs. The annual license subscription includes three seamless upgrades per year as well as world-class security, performance, availability, and reliability. Customers are automatically enrolled in our Standard Success Plan but have the opportunity to upgrade to our Premier Success Plan or Signature Success Plan, which provide customers with maximum business value through proactive, personalized expertise.

Salesforce offers several support levels based on the customer’s Success Plan. All customers receive a Standard Success Plan with Premier and Signature Success Plans available for purchase. Support channels, hours, and initial response times depend on the Success Plan level.

#### Standard Success Plan

Standard Success Plans are complimentary to all Salesforce customers and include technical support, online help and training, and access to the Salesforce Success Community. Standard support is available 12 hours per day on weekdays (from 8 a.m. to 8 p.m. in the United States and 8 a.m. to 6 p.m. in other regions). Cases can be opened via our online Help Portal.

#### Premier Success Plan

The Premier Success Plan provides specialized guidance whether you have how-to questions, experience technical issues, need troubleshooting, or want to increase the value you get from Salesforce. Benefits include:

- 24/7 online and phone support by senior support analysts
- Expert coaching sessions
- Reviews of your platform health and business value
- Developer support
- Expert Assistance
- Specialized Guidance
- A discount on all Trailhead Academy courses and certifications
- Quicker response times than Standard Success. When critical issues arise, our skilled support engineers respond within one hour.

#### Expert Assistance



Expert coaching sessions are specialized engagements designed to help you get more value from Salesforce products. With Premier Success, you can attend webinars on a specific topic and watch coaching videos and then have an individual follow-up session to dive deeper. We also offer personalized sessions with Salesforce experts to help you overcome obstacles and drive long-term success. More than 200 options cover a range of needs and interests across Salesforce products.

To get real-time answers to your questions, Premier Success includes live Q&A sessions with Salesforce experts, addressing topics from adoption and instruction to best practices. Specialized technical support is also available for admins and developers to troubleshoot custom code issues.

#### Specialized Guidance

To help ensure that you see continuing success with Salesforce, Premier Success includes personalized guidance and insights. Through periodic reviews and check-ins, we evaluate your platform health and value maturity. These technical and business reviews assess key areas of platform performance, prioritize areas for growth, and set and track progress against your targets with quantifiable success metrics.

#### **Signature Success Plan**

Signature Success is the highest level of support from Salesforce and provides a high-touch experience led by a named expert who acts as an extension of your team. Customers with Signature Success benefit from increased performance and productivity through all the features of Premier Success plus:

#### Technical Account Manager (TAM)

Account management by a named champion. An assigned TAM provides consistent advocacy and guidance with a deep understanding of your business. These highly experienced technical experts provide support case oversight and escalation, weekly meetings, and tailored solution guidance.

#### Proactive Services

Signature Success includes 24/7 monitoring that is tailored to your configuration. Your TAM coordinates with Proactive Services Engineers experts and helps ensure you prevent or mitigate potential issues identified before they can create business disruption. If anything does go wrong, you can expect early alerts, remediation, and reviews to eliminate recurring root cause patterns.

Available at all times and offers the fastest case response times, including 15 minutes for severity 1 issues via phone or chat through our Help site. Customers have also access to a dedicated emergency #911 hotline for urgent help with critical issues.

Phone Support by Region and Success Plan:

<https://help.salesforce.com/articleView?id=000321274&&type=1&&mode=1>.

In addition to contacting Support, customers can visit the Salesforce Help site and online user community to find information or troubleshoot. We provide a variety of self-service tools to support users, including knowledge articles, training courses, videos, and other resources. Customers can also collaborate with other users to resolve their inquiries and find solutions.

### **Benefits of a Cloud Based Model**

With the Salesforce cloud-based service model, **West Virginia** would only pay for the cloud services that are used, unlike traditional software solutions in which all of the necessary hardware and software is purchased initially in the hopes that the solution will grow to use all of it.

Salesforce's cloud services offer a tremendous amount of value in the sense that your organization doesn't have to procure hardware or software upfront that it might not use until the project is fully implemented later. Another significant differentiator is the flexibility in costing models that Salesforce can provide that account for surges in usage during peak times. This flexibility provides **West Virginia** with the absolute most value by not having to overbuy the solution from day one of implementation.





The Salesforce cost model is subscription based and varies by product. Most of our products are in a per user/month or user/year format billed annually. There are some products offered as usage consumption, total logins per month, or by a defined number of members billed annually. We also have offerings that are offered by an edition representing a bundle of products.

For us to provide an accurate price estimate, further discovery is needed to understand the full scope of **West Virginia** requirements and user base.

To help our customers understand the return on their investment in Salesforce, we provide a ROI Calculator that is available for customers to use at <https://www.salesforce.com/form/conf/service-cloud/service-roi-calculator/>.

### **Delivering with Speed, Reducing Risk, and Maintaining Flexibility**

The Salesforce "low code - no code," deeply unified platform allows organizations to "configure rather than code" the desired solution that works with a rich data model to customize workflows and engage customers and other stakeholders in their channel of choice, such as chat, mobile, and web, which are used in their regular day-to-day interactions with the best brands in retail, media, and travel. This familiarity improves adoption but also drives cost down.

## **Salesforce Cost Model**

### Subscription

The Salesforce cost model is subscription based and varies by product. Most of our products are in a per user/month or user/year format billed annually. There are some products offered as consumption usage, total logins per month, or by a defined number of members billed annually. We also have offerings that are offered by an edition representing a bundle of products.

1. **Pay-as-you-go** - in which customers purchase subscriptions based upon their immediate need.
2. **Pre-Purchased Plus Usage Consumption** - pre-purchased credits, a fixed subscription with an included usage allocation.
3. **Volume** - to take advantage of additional volume discounts. Volume discounts may apply based on your organization's use case scope, final total user counts, and their access requirements. This information is needed to derive an accurate price estimate.
4. **Salesforce Enterprise Subscription Addendum (SELA)** - to achieve the greatest financial savings, many customers provide multiple Salesforce applications to all of their employees. SELAs are based on the total subscription mix, volume, and term of the addendum that is negotiated with West Virginia.

### Implementation Costs

This is the additional cost to configure the solution and incorporate new learnings and changes to the application. Typically, the implementation of cloud-based solutions accounts for 30% to 50% of the timeline and budget compared to implementations of on-premises solutions. We offer Salesforce Professional Service (SPS) as well as a large ecosystem of certified/trusted system integration providers that can support West Virginia with your Salesforce implementation and would provide you with a project plan and resources to complete the system deployment. Salesforce provides the underlying technology platform that would form the foundation for your organization's configured solution. Partners are searchable by expertise and region at <https://appexchange.salesforce.com/consulting>.

### Lower TCO and a Dramatic Return on Investment (ROI)

Salesforce AI-Powered Cloud Solutions can deliver clear customer and organizational benefits, with the largest benefit coming from employees and customers touch points (at 62%), such as customer service calls. The second largest benefit is improved overall customer experience (61%), and lowered costs to acquire, retain, or service customers (47%).



View the [IDC White Paper: The Salesforce AI Economy Forecast](#) for more information and full details.

Salesforce gives public sector organizations tremendous value by enabling them to anticipate the significant savings they can achieve, as opposed to using the traditional cost model for enterprise software. Since all of our customers generally pay per subscriber for the Salesforce service over the life of the subscription contract, customers benefit from being able to fully anticipate these future costs. After all, they don't have to buy hardware or software upfront that they will only use later. Another key differentiator is the flexibility in cost models we can offer to account for peaks in usage. In addition, because Salesforce implements all updates on Salesforce servers, all Salesforce customers benefit immediately from new features and functionality on each release date.

Independent studies conducted by leading industry analysts such as Gartner, Forrester, and IDC (International Data Corporation) demonstrate the cost-effectiveness and high return-on-investment potential of the Salesforce platform. The IDC study published in October 2020 cited the following key business results:

### Integration

Salesforce has an ecosystem of Salesforce certified System Integration partners that directly respond to procurements and contract as prime contractors to support our government customers with their Salesforce solution implementations. Salesforce provides the underlying technology platform that would form the foundation for the customer's configured Software as a Service (SaaS) / Platform as a Service (PaaS) solution.

Salesforce is partner agnostic. Any partner that desires to respond to a public procurement is permitted to do so. During a formal procurement process, Salesforce provides the same level of support to all responding partners. Responding partners prepare their proposal responses independent of one another. Strategy calls with Salesforce and responding partners are held separately to understand each partner's proposal development timeline, solution approach, etc.

Salesforce licensing costs are prepared separately with each responding partner based on their proposed **Salesforce products to meet the customer's requirements. This can vary by partner based on their individual interpretations of the customer's requirements.** Salesforce does not share cost information between partners.

During down selection, Salesforce is notified via the down selected partner if Salesforce resources are required to help prepare or present during a vendor demonstration. Should multiple Salesforce partners be selected for demonstration, Salesforce resources may be firewalled as needed and/or based on the prescribed requirements in the procurement. Salesforce does not share partner qualifications or experience across partner teams.

### Salesforce Partner Community

The Partner Community for Consulting Partners is designed to help consultants, implementation partners, and systems integrators through the lifecycle of growing customer business.



Salesforce directs partners to use their Partner Navigator distinctions to showcase the depth and breadth of their expertise. Partner Navigator highlights partners' expertise across industries, products, and services, allowing them to earn public distinctions. This expertise is validated by Salesforce and can be verified on [Salesforce Consultants on the AppExchange](#). The Expertise tab on AppExchange is updated daily to reflect these distinctions, helping customers and prospects easily find and verify partner capabilities. Prospects can use the [findpartners.salesforce.com](https://findpartners.salesforce.com) site to search for partners based on project needs, location, and practice size.

It is up to our customers to evaluate and select the best partner based on the customer's procurement evaluation criteria that the customer believes will best meet their desired requirements and objectives.

## Additional Considerations:

Salesforce has compiled functional and technical requirements, which Salesforce recommends be included in order for West Virginia to be provided with a robust, reliable, and easily configurable solution. The matrix is a number of worksheets representing requirements from general, enterprise collaboration, customer service & support, and mobile, to infrastructure & security, and more. Many Salesforce customers have leveraged these requirements to assist in the development of their procurement development efforts (e.g., RFP/Tender).

A copy of these detailed requirements can be provided at the State's request, but minimally, Salesforce recommends the following requirements to help ensure your success with a future solicitation:

- Solution has open APIs that allow seamless integration with legacy applications, third-party solutions, or an external cloud-based service.
- Cloud Platform SaaS products are natively integrated with no special integration required to connect or synchronize data.
- Solution is mobile enabled out of the box on any device (no custom coding or programming required).
- Multiple, seasonal release updates a year are included in the subscription service without any re-configuration, customization, or costs and with minimal to no downtime.
- Access to an online application library of pre-built apps that can be added on demand to rapidly implement new capabilities using clicks and not code.
- Solution has built-in as well as on demand, interactive training curriculum, and modules for upskilling staff and speeding user adoption.
- Declarative platform includes ability to rapidly expand existing application functionality as well as develop additional apps with point and click tools.
- Solution is accessible through a web browser with no software to download or hardware to install.
- Provides a social, collaborative enterprise platform supporting portals and multiple communities.
- Platform performance and security statistics are openly available in real time online including details of any future planned down time.
- Single click deployments from Sandbox to production and auto refresh are standard capabilities.
- Solution provides search results across the entire platform, on any device.
- Collaboration capability is fully integrated, native across the Cloud Platform and provides collaboration in context of accounts, contacts, cases, etc.
- Solution User Interface is componentized enabling elements on pages to be composed into custom applications.



- Provides pre-built processes, integrations, and user hierarchies to minimize configuration. Includes low code and no code application development capabilities to limit customization and enable rapid application development and deployment.

In conclusion, the "Run, Optimize, Innovate" strategy for Salesforce Public Sector solutions not only enhances operational efficiency but also delivers substantial ROI, positioning government organizations for long-term success.

By focusing on compliance, automation, and integration, West Virginia can maximize the efficiency of its Salesforce solutions for government use. Furthermore, leveraging Salesforce's data unification and analytics capabilities ensures that all solutions contribute to a comprehensive Executive Insight 360 dashboard, providing actionable intelligence for executive leadership data-driven decision making.



## Salesforce Inc.

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Salesforce is a global leader in customer relationship management software, delivering our cloud-based software through the internet as a service, bringing the public sector and customers together in the digital age. Founded in 1999, Salesforce enables organizations of every size to take advantage of powerful technologies—cloud, mobile, social, voice, and artificial intelligence—to connect to their customers in a whole new way.

The Salesforce Customer 360 (C360) for Public Sector is an integrated platform for public services that brings mission-critical capabilities to life - enabling relationship management, case management, team collaboration, integration, analytics and business intelligence, engagement and outreach, and modern application development both within Salesforce and for third parties. Salesforce operates on a Deeply Unified Platform, integrating across the entire product suite, architecture, and a single code base. This unified approach ensures that all experiences, applications, and platform capabilities are delivered as a single, cohesive capability to customers. Despite being highly integrated, the platform remains open, allowing connections to any part of the enterprise. This openness, extensibility, flexibility, and customizability enable organizations to interact with any part of their enterprise in any way they need.

Salesforce is at the forefront of CRM innovation, consistently leading the industry. With nearly a decade of experience, we have been at the cutting edge of integrating Artificial Intelligence into CRM through our proprietary Salesforce Einstein technology. For government and public sector organizations, the application of AI presents a transformative opportunity to enhance operational efficiency and elevate the quality of service provided to the citizens. The Salesforce Platform seamlessly incorporates AI across our comprehensive application suite, fostering unparalleled customer engagement, boosting staff productivity, and solidifying trust—all within the powerful synergy of Customer 360+Data+Agents.

In 2024 Salesforce created Agentforce to address the growing demand for automation, enhance customer support, leverage advancements in AI and machine learning, improve productivity and efficiency, deliver personalized customer experiences, stay competitive, support digital transformation, and uphold its commitment to trust and security. By developing Agentforce, Salesforce aims to provide organizations with a powerful AI-driven platform and a suite of out-of-the-box tools to build, customize, and deploy autonomous AI agents that support public sector organizations and their citizens. Developed with fairness, transparency, and accountability in mind, Agentforce ensures responsible and ethical operation, and it is set to revolutionize customer service for Government, Non-Profit, and Educational institutions.

Agentforce is built on Data Cloud and our metadata platform, ensuring real-time data enhances every platform layer, enabling organizations to customize an agent using existing Platform tools like Flows, prompt templates, Apex classes, and APIs.

The Salesforce platform advantage, summarized by the acronym D.A.T.A., stands for Data, Artificial Intelligence, Trust, and Action. Salesforce excels in data management by unifying and analyzing data from various sources, creating comprehensive customer profiles and driving personalization. Artificial Intelligence is embedded through Einstein AI, offering secure and trustworthy AI solutions with features like generative AI and data masking. Trust is a foundational principle, with robust security measures and data privacy controls ensuring compliance and transparency. Action is facilitated through automated





workflows, real-time data monitoring, and integration with other Salesforce products, enabling businesses to take meaningful actions based on insights. Together, these components provide a robust framework for business success.

Most organizations face the significant challenge of managing data from disparate sources—both internal and external, structured, and unstructured. Salesforce helps organizations unify all of their data, from any source, with Data Cloud. Data Cloud gives organizations the tools they need to build a unified view of citizen information, providing a comprehensive view of the entire organization's data, regardless of the source. With artificial intelligence integrated across all products, Salesforce leverages AI technology throughout its suite of products to enhance both operational efficiency and customer engagement and helps organizations work more productively and better deliver a personalized citizen experience.

According to an [IDC study](#), Salesforce and its partner ecosystem, fueled by the new wave of generative AI, will create a net gain between 2022 and 2028 of more than \$2 trillion in business revenues and 11.6 million jobs. The study also identified the factors driving adoption of AI – led by improving productivity – and the biggest barriers to adoption, including the talent gap, data governance and risk management, cost, and trustworthiness and bias.

With thousands of customers and an ecosystem that includes over 2.5 million developers as well as hundreds of certified partners, Salesforce demonstrates how trusted, agile cloud applications help public sector organizations build trust and deliver better digital services.

## FY24 Highlights

**\$34.9 billion**

Revenue, up 11% year over year

**\$56.9 billion**

Remaining Performance Obligation<sup>1</sup>, up 17% year over year

**\$10.2 billion**

Operating Cash Flow, up 44% year over year

**30.5%**

Non-GAAP Operating Margin<sup>2</sup>

**90%+**

of the Fortune 500 are Salesforce customers

**8.7 million**

Hours contributed to the community since inception

1. Remaining Performance Obligation<sup>1</sup> represents future revenues that are under contract but have not yet been recognized.

2. Non-GAAP operating margin is a non-GAAP financial measure. Refer to page 6 for a reconciliation of GAAP to non-GAAP financial measures.

The FedRAMP-authorized Salesforce Government Cloud Plus - the world's #1 enterprise cloud, built for government – gives stakeholders the mobile, self-service tools they need to connect data, process, and people while also reducing the risk, cost, and the complexity of traditional IT. Salesforce's trusted Government Cloud Plus, delivered in an isolated infrastructure to meet Government Certification



requirements, accelerates government transformation to rapidly and securely deploy solutions with a multi-tenant cloud infrastructure that meets all security and compliance requirements.

Salesforce is committed to a set of core values - trust, customer success, innovation, equality of every human being, and sustainability. For more information, please visit [www.salesforce.com/government](https://www.salesforce.com/government).

## Recognition for Leadership in the Cloud

Salesforce has received multiple awards and recognition for its expertise and leadership in the cloud. From Salesforce's beginnings 25 years ago, their 150,000+ customers have responded to their cloud computing offerings with overwhelming enthusiasm. Such success has propelled Salesforce to be #1 in Enterprise Cloud Computing and #1 in CRM according to International Data Corporation (IDC). Salesforce also ranks as the Leader in the Gartner Magic Quadrants for "Customer Data Platform", "Sales Force Automation" (SaaS), "CRM Customer Engagement Center", and "Multichannel Marketing Hubs". In addition to the recognition from leading Industry Analysts, Forbes Magazine named Salesforce "Innovator of the Decade" and has named Salesforce one of the World's Most Innovative Companies nine years in a row.

According to [Gartner](#), Global AI software spending in the government market is forecast to increase 18.0% in 2024 to \$41.6 billion and reach \$70.6 billion by 2027.

<b>Gartner.</b>	The Leader in Sales Force Automation Platforms for the 18th consecutive year, 2024	<b>FORRESTER</b>	A Leader in The Forrester Wave™: Enterprise Marketing Suites, Q3 2022
<b>Gartner.</b>	A Leader in Field Service Management, 2022	<b>FORRESTER</b>	A Leader in The Forrester New Wave™: Marketplaces for SaaS Sourcing, Q4 2023
<b>Gartner.</b>	A Leader in Analytics & Business Intelligence Platforms, 2023	<b>FORRESTER</b>	A Leader in The Forrester New Wave™: Sustainability Management Software, Q1 2022
<b>Gartner.</b>	A Leader in Multichannel Marketing Hubs for the 12th consecutive Year, 2023	<b>FORRESTER</b>	A Leader in The Forrester Wave™: Digital Experience Platforms, Q3 2021
<b>FORTUNE</b>	Salesforce ranked #1 in CRM Market Share for the ninth consecutive year, 2022	<b>IDC</b>	Salesforce ranked #1 CRM provider for 10 consecutive years in its Worldwide Semiannual Software Tracker
<b>FORTUNE</b>	Salesforce recognized as One of Fortune's 100 Best Companies to Work For, 2023	<b>Forbes</b>	Salesforce ranked #1 on The World's Most Innovative Companies List, 2022
<b>FORTUNE</b>	Fortune's Best Workplaces in Technology™, 2023	<b>LinkedIn</b>	Salesforce recognized as one of the Top Companies for Technology & Information, 2022

The Magic Quadrant Gartner reports reflected in this graphic are available upon request from Salesforce. To access these reports, please go to: <https://www.salesforce.com/company/recognition/analyst-reports/>.

Rated #1 by IDC, Gartner, and Forrester, the Salesforce Platform has been designed to provide customers with high levels of performance, reliability, and security. Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the service to scale reliably, and cost-effectively to accommodate millions of users. West Virginia will not need to maintain any hardware or software. The Salesforce cloud-based architecture will allow West Virginia to deploy the proposed solution.

Salesforce is a publicly owned US corporation (CRM on the NYSE). All of our financial records are publicly available at [this link](#).

## The Salesforce Advantage

Salesforce offers a digital-first, secure, citizen engagement Salesforce Platform that unites teams, and unifies data with a single, shared view of the citizen, allowing public sector organizations to modernize their CRM and focus on building and maintaining relationships with citizens.

Salesforce operates on a *Deeply Unified Platform*, integrating across the entire product suite, architecture, and a single code base. This unified approach ensures that all experiences, applications, and platform capabilities are delivered as a single, cohesive capability to customers. Despite being highly integrated, the platform remains open, allowing connections to any part of the enterprise. This openness, extensibility, flexibility, and customizability enable organizations to interact with any part of their enterprise in any way they need.



***Deeply Unified Platform***

Salesforce facilitates the delivery of personalized interactions across all channels in a connected service experience—web, email, phone—and enables teams to respond faster and increase productivity. It also provides organizations with an AI-powered platform that allows public sector organizations to modernize services and work more efficiently with a single, comprehensive platform.

The integration of AI into the Salesforce Platform enables data-driven decision-making, crucial for improving service delivery and operational efficiency. By harnessing the power of artificial intelligence and agents, organizations can streamline processes, automate repetitive tasks, and provide valuable insights to help organizations better serve their citizens. Agentforce provides tools designed to enhance the efficiency and effectiveness of Public Sector organizations, and overall mission delivery. Autonomous AI agents automate routine tasks and provide real-time data analysis, enabling organizations to focus on more strategic initiatives and improve service delivery to citizens, while Agentforce helps manage and optimize agent performance.

One of the key features of the Salesforce Platform is its ability to analyze large amounts of data quickly and accurately. This allows public sector organizations to make data-driven decisions and improve the



delivery of services to the public. Additionally, the platform can automate repetitive tasks, freeing up valuable time for your organization's employees to focus on more important and complex issues.

With the Salesforce Platform, connecting data across systems, apps, and devices creates a single source of truth and empowers West Virginia to integrate disparate systems. This brings all your data together as a single source of truth to enable teams to work more effectively and enriches the citizen experience.

In the Public Sector we know trust is an important component of your mission and public sector organizations need trusted solutions to take on the challenges facing their communities. Salesforce is committed to safeguarding your information by continuously enhancing our applications, systems, and processes to address the evolving requirements and complexities of security.

Trusting AI with West Virginia's confidential information and your citizen data while balancing the benefits of AI is a challenge many organizations face. [The Einstein Trust Layer](#) is a secure AI architecture, built into the Salesforce platform. It is a set of agreements, security technology, and data and privacy controls used to keep your organization safe while you explore AI solutions.

The Salesforce Platform allows public sector organizations to modernize citizen services with Customer 360, Data, AI, and trust, setting the stage for sustained achievement.

### **Multitenant Model: API Driven, Rapid Scalability and Free Upgrades**

Salesforce is built on a unique, multitenant architecture: cloud services share a single common infrastructure, code base, and platform that is centrally managed—removing unneeded tasks from the process of delivering, managing, and integrating software. Salesforce delivers configurable, scalable solutions all via the web. The following reasons highlight why multi-tenancy is a benefit for your organization:

- Salesforce provides three complimentary, seamless, and automatic major release updates per year, which won't impact West Virginia's workflows, integrations, reporting, or configurations. Maintenance and upgrades, including security patches and compliance driven updates, are pushed out to all organizations at the same time rather than to each individual tenant's system. This reduces the amount of time your teams have to spend maintaining and protecting your data, since there are no multiple versions to support. Integrations, customizations, and configurations are updated automatically, allowing your IT resources to focus on innovation instead of managing many different version updates.
- Although centrally managed, the Salesforce Platform is fully configurable through clicks to meet your unique requirements. Our point-and-click, drag-and-drop tools make it easy for non-technical administrators to configure the solution. For more technical administrators and multifaceted customizations, you can utilize Apex code to build complex business logic into your application.
- Multi-tenant cloud platforms are highly scalable. Multi-tenancy gives applications elasticity. They can easily scale from one to tens of thousands of users from one program to the next without the need for additional hardware or software.
- Mobility is a native capability of the Salesforce Platform. The Salesforce Mobile App, compatible with iOS and Android, provides a seamless mobile experience with access to most application functions. It is a standard feature requiring no customization or third-party tools. Users can access Salesforce services configurations, customizations, settings, and data from anywhere. The app allows building and operating mobile and desktop apps on one platform, developing tailored mobile profiles, and automatically pushing configurations/customizations, eliminating the need for device sync.

### **API-First Approach: Open API and Seamless Integration**

Salesforce provides out-of-the-box APIs that enable organizations to both integrate our solution with existing third-party, custom, and legacy apps and write their own application services that integrate with our solutions.



- With the flexibility that the Salesforce platform provides, there are a range of integration options available from native Web Services support (APIs, outbound workflow, etc.) to import/export utilities to middleware integration via packaged connectors to toolkits for Java, .NET, and more.
- The MuleSoft Anypoint Platform helps to further expand connectivity to a wide range of systems including point-of-sale and ERP systems without the need for multiple copies of data stored in different locations. Maximizing value, reuse, and savings are key to managing risk for large enterprise projects and implementations. Through MuleSoft, West Virginia will be able to integrate data regardless of if that source system is on premise or in the cloud, allowing additional flexibility as West Virginia continues to address digital transformation needs.
- Driven by the API-first principle, apps can use open APIs based on industry standards such as REST and SOAP to add data from other systems. For more complex apps, developers can leverage the Apex programming language. Apex is an object-oriented, on-demand language, which enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages.
- Data Cloud Integration: Salesforce Data Cloud delivers a unified profile by bringing together customer source records, transactions, engagement activities, demographics, and signals from first or third-party data sources. It provides organizations a single source of truth for their citizens and makes that data available for creating personalized experiences across every touchpoint.

### Trusted Platform with Security First Infrastructure

Salesforce maintains a comprehensive set of compliance certifications and attestations to validate our #1 value of Trust. These are listed on our Compliance Portal available here:

<https://compliance.salesforce.com/en/documents>. These standards serve as independent evidence of the security measures in place, providing organizations with reassurance about the security of their data. By meeting these standards, Salesforce demonstrates its commitment to maintaining a secure environment for its users.

Salesforce uses a multi-layered approach to protect your data, constantly monitoring and improving our application, systems, and processes to meet the growing demands and challenges of security. In addition, independent audits confirm that our security and subject matter experts go far beyond what most customers would have been able to achieve on their own. This contributes to Salesforce's ability to meet a number of compliance requirements, including:

- **Hyperforce.** The Salesforce Platform for Public Sector is built on Hyperforce, our trusted cloud-native architecture. Hyperforce infrastructure is composed of code rather than hardware, so that the Salesforce platform and applications can be delivered rapidly and reliably to locations worldwide, giving customers more choice and control over data residency. Salesforce products running on Hyperforce benefit from its integration of enhanced standards for compliance, security, agility, and scalability, and from Salesforce's continued commitment to privacy. By providing a common foundation for deploying our application stacks, Hyperforce accelerates Salesforce's ability to innovate across product clouds and deliver additional business value to customers.
- **Platform-Level Services.** Several of Salesforce's platform-level services also contribute to data security and meeting compliance requirements:
  - Salesforce Shield offers an additional layer of security with platform encryption, event monitoring, and two-factor authentication.
  - We publish updates to our platform three times per year, which push out to deployments automatically, meaning patches and upgrades are distributed without expecting mission-critical teams to become overnight IT experts.
  - Integrated data from any type of data source and AI capabilities enable teams to pull real-time reports and dashboards as needed to respond to data calls, brief supervisors, reference in press conferences, and more – all with the level of confidence and reliability expected of the government.





- **Trusting generative AI with your organization's secrets and your citizen data while balancing the benefits of generative AI is a challenge many organizations face.** [The Einstein Trust Layer](#) is a secure AI architecture, built into the Salesforce platform. It is a set of agreements, security technology, and data and privacy controls used to keep West Virginia safe while you explore generative AI solutions.

## AI-Powered Platform

The Salesforce Platform is our portfolio of solutions and services that empowers public sector organizations to modernize services. By integrating AI technologies, such as AI agents and predictive analytics, organizations can automate routine tasks, improve response times, and deliver proactive services based on data insights.

To enhance trust and build stronger citizen relationships, Salesforce brings together customer 360, AI, data, and trust to facilitate integration of artificial intelligence and data analytics into one platform allowing you to:

- **Reduce cost with automation and AI.** West Virginia can eliminate unnecessary paperwork, streamline processes, and increase user productivity by using AI to summarize reports, articles or review Slack channels and summarize for your users – making recommendations for users to review and edit instead of starting with a blank page.
- **Significantly enhance customer service through workflow automation, data management, and AI Agents.** Leveraging large language models, the Agentforce AI Agent provides an autonomous and empathetic conversational AI assistant, helping to ensure higher case resolution and seamless service. Additionally, Agentforce's AI agents improve productivity with 24/7 natural, data-driven responses, and easy setup through low-code solutions. By leveraging conversational AI, customization, and seamless integration with Salesforce, Agentforce provides a robust solution for improving efficiency, service delivery, and data-driven decision-making. Configure agents with low code tools using clicks and natural language instructions to design agents that understand your mission, operations, and organization knowledge.
- **Integrate intelligent automation capabilities.** Salesforce core products along with MuleSoft, Slack, and Tableau can be seamlessly combined into a single, robust solution. This enables organizations to drive productivity and achieve both time and cost savings.
- **Unlock and analyze vast amounts of data** to gain insights into citizen behavior, preferences, and trends, allowing personalized interactions and providing more targeted and relevant citizen focused solutions. This helps to build trust with citizens by demonstrating a deep understanding of their needs and delivering value at every touchpoint of citizen engagement.
- **AgentExchange:** Salesforce has launched AgentExchange, a marketplace for Agentforce, their digital labor platform. AgentExchange allows partners and developers to build and sell AI components like actions, templates, and topics. It features over 200 partners and hundreds of pre-built solutions to help businesses create and deploy AI agents. The platform aims to expand the capabilities of Agentforce and participate in the digital labor market.
- **Salesforce's Agentforce 2dx** is an enhanced digital labor platform featuring proactive AI agents, low-code and pro-code tools, a free Developer Edition, and a marketplace for AI templates, aimed at improving efficiency and scalability by integrating with existing systems and offering comprehensive tools for configuration, testing, and deployment.



## Move with Speed

Salesforce offers out-of-the-box, no-code, low-code capabilities allowing organizations to rapidly configure solutions to modernize common business processes and operations. Organizations can reduce cost and dependency on legacy development technologies with high availability, flexibility, and capacity on demand. West Virginia can streamline workflows, organize resulting data and information into personalized citizen experiences, and deliver services faster, such as:

- Streamline engagement without having to manually upload data, wait on communications to go out, answer data calls or stitch together a custom-built report instead of integrating third-party systems.
- Quickly collaborate with other users, subject matter experts, and partners that are critical in helping your organization meet its mission.
- Digitize and standardize more touch points across programs, services, and activities, bringing it all together in a single, 360-degree view of your citizen.
- Meet citizens where they are with 24x7, self-service interfaces that enable West Virginia's employees to respond in real-time across a number of communications channels.
- Improve communication and collaboration within public sector entities. By providing a centralized platform for sharing information and coordinating efforts, the Salesforce Platform can help streamline workflows and improve overall efficiency.
- Automate repetitive tasks, freeing up valuable time for West Virginia's employees to focus on more important and complex issues.
- Organize your data with Salesforce in order to take advantage of the AI trends by turning touch points into data points, standardizing formats, setting up governance models and bringing it all together in a 360-degree view. AI-generated recommendations are only as effective as the data that fuels them; the more information being analyzed; the more statistically significant AI's findings will be.



### **Intuitive and Easy to Use**

Your organization's users don't have to be IT experts to build new customized apps, new ideas, or new innovations. Salesforce solutions are designed with low-code, no-code and are easily configurable with access to pre-built apps, and built-in training for users.

- The Salesforce Platform provides drag-and-drop features that will speed up and streamline your development process. To improve efficiency and achieve the highest value from your Salesforce investment, West Virginia can easily configure the solution to best fit your user's needs. Users can build complex flows, configure their user interface, build agents, or develop applications with just a few clicks vs. writing lines of code – to name just a few. The Salesforce Platform offers tools to make it possible to create both fast and easy configurations through clicks, as well as customizations to satisfy any requirement through code methodology.
- With the Salesforce AppExchange, West Virginia will have access to 7,000+ prebuilt apps automatically integrated with Salesforce SaaS and PaaS solutions as well as access to a network of certified consultants that can assist you with your Salesforce implementation and provide a managed service. With just one click and a Salesforce account, West Virginia can expand its initial investment by finding, testing, and deploying pre-integrated apps – you can extend the Salesforce Platform and tackle organization problems or quickly pivot as your needs change. For more information, visit <https://appexchange.salesforce.com/>.
- Trailhead is a gamified learning platform created by Salesforce where users access a variety of online courses and tutorials for free on topics such as Salesforce solutions, business skills, and technology. Users can tailor their learning to match individual goals and interests, get hands-on experience with interactive modules in demo or "sandbox" environments, and advance their skill levels based on their career paths. Users can also connect with other Trailblazers, mentors, and experts to share knowledge, ask questions, and collaborate on projects. This sense of community fosters continuous growth and development.

### **Secure Collaboration and Work Acceleration**

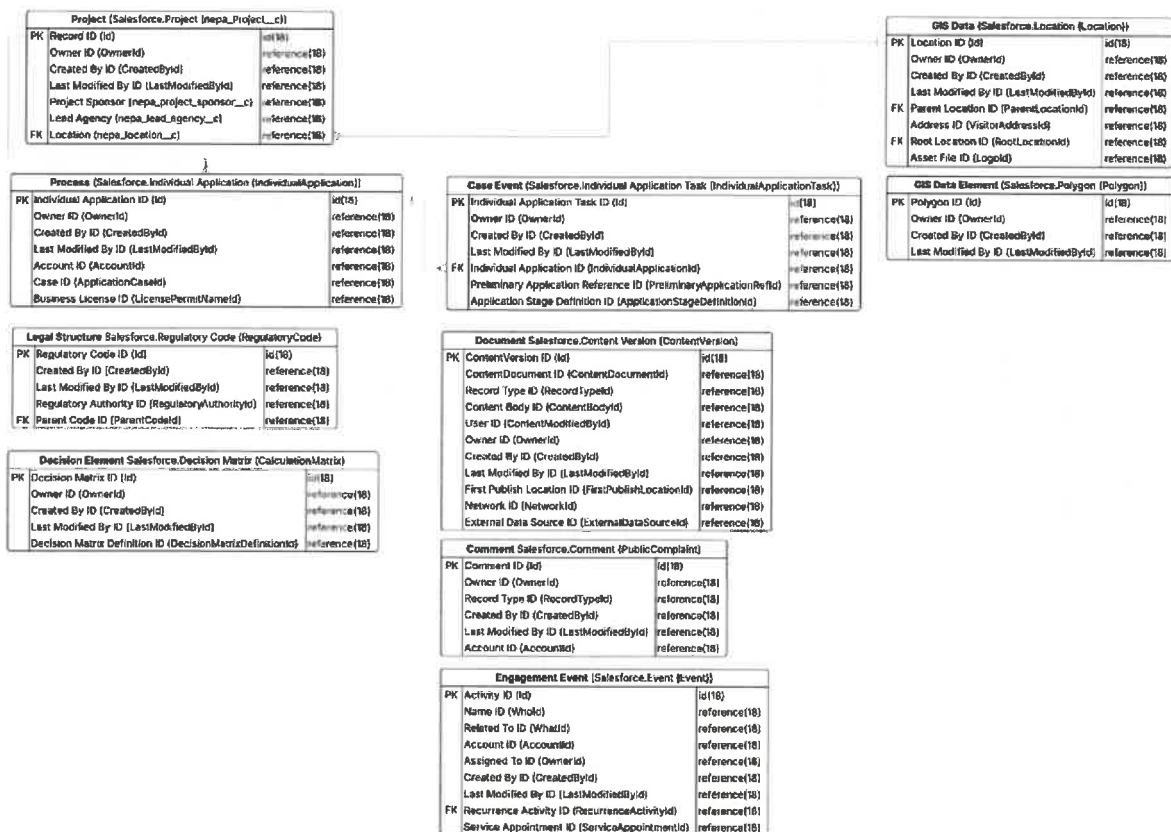
Slack is a secure Instant Messaging (IM) communication and team collaboration platform for your organization. Slack serves as a secure and centralized digital hub that gives public sector organizations, contractors, and system integrators the ability to communicate in real-time as if they were one team.

- Teams can all stay on the same page and make decisions faster by bringing all your work communication into one digital HQ. When you log in to Slack, you can prioritize the channels with the most important and urgent project work, case work, etc. rather than sifting through an overflowing email inbox.
- Replace information silos with a culture of knowledge sharing by bringing teams and tools together in organized and accessible channels. Channels help public-sector teams stay organized and focused with central spaces for conversations, files, tools, and people.
- Teams of all sizes and types manage their status updates directly in Slack, reducing their weekly meetings and face-to-face touchpoints, facilitating asynchronous collaboration which results in increased productivity.
- Slack can be integrated with the tools your teams already use today, connecting all your tools in a single place, making it easier for teams to access them, share information, and deliver on your mission.
- Organizations can accelerate digital onboarding and foster engagement in an inclusive and transparent digital-first workspace.
- Enable a single, shared source of truth for all types of use cases across your internal users and external ecosystem.
- Agentforce Steps in Slack Workflow Builder: Enables developers to embed Agentforce into no-code automations in Slack. Trigger Agentforce from Slack events and pass Slack conversational context back to Agentforce without needing to rely on user-initiated action.

## Appendix

Existing permitting systems can be modernized incrementally using Salesforce Public Sector Solutions (PSS). Salesforce's Public Sector Solutions data model is designed for government permitting agencies, allowing for the definition of regulatory agencies, authorization types, and codes, and can be extended to encompass the National Environmental Policy Act (NEPA) taxonomy and data standards.

Below is a mapping of the new data standards to the PSS data model:



### Mapping from NEPA to Public Sector Solutions Data Model

NEPA Entity	Public Sector Solutions Entity	NEPA Definition	PSS Mapping Explanation
Project	N/A	An agency's activity or decision requiring initiation of a review or permit process. A project may have a relationship to multiple processes.	This is represented as a custom object in NEPA Accelerator for PSS. The custom Project object serves as a parent to multiple permit / authorization applications.

<b>Process</b>	IndividualApplication	The activity related to issuance or denial of an environmental review, permit, or authorization that an agency is seeking for a project.	In PSS, the process of issuing or denying a permit is represented by an IndividualApplication. Additional fields and relationships were added to capture different agency relationships etc.
<b>Legal Structure</b>	RegulatoryCode	Legal, policy, or process data guiding the process	In PSS, the RegulatoryCode object is used to document the regulation code enforced by the regulatory body.
<b>Decision Element</b>	DecisionMatrix	Decision Model Notation representation of the inputs and outputs of the process	The Salesforce Business Rules Engine supports Decision Model Notation using Decision Matrix
<b>Decision Payload</b>	DecisionExplanation	An array of data elements that deliver responses to and/or results of the evaluation. criteria	Decision Explanations include the elements evaluated; decisions made by business rule execution
<b>Case Event</b>	IndividualApplicationTask	A case event represents a step within the environmental review or permit process and is tracked in a case management system for task management	In PSS IndividualApplicationTask represents a task related to a permit / authorization process
<b>Document</b>	ContentVersion	A document created during the environmental review, permit, or authorization process	Represents a specific version of a document in Salesforce Files
<b>Public Comment</b>	PublicComplaint	Feedback submitted by individuals or organizations	In PSS, PublicComplaint represents the feedback submitted by public users
<b>Engagement Event</b>	Event	Opportunities for interaction in the environmental review or process, windows for involvement such as public meetings, consultations	Events in Salesforce are used to track meetings with customers, prospects, and colleagues. Drill down from events to



			related records, files, and more
<b>GIS Data / GIS Data Element</b>	Location / Polygon	A container for location-based information, ranging from simple points to complex polygons	In PSS, a Location can be a work site, an address, or an abstract location like a region. Mapping data for a Location can be stored in Polygon object



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

State of West Virginia  
Centralized Request for Information  
Info Technology

<b>Proc Folder:</b> 1739093			<b>Reason for Modification:</b> Addendum No. 5 - to extend time from 1:30 pm to 3:00 pm.
<b>Doc Description:</b> One-Stop-Shop Permitting			
<b>Proc Type:</b> Request for Information			
<b>Date Issued</b>	<b>Solicitation Closes</b>	<b>Solicitation No</b>	<b>Version</b>
2025-08-29	2025-08-29 15:00	CRFI 0201 SEC2600000001	6

**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**

Tara Lyle  
(304) 558-2544  
tara.l.lyle@wv.gov

**Vendor  
Signature X**

**FEIN#**

**DATE**

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

**ADDITIONAL INFORMATION**

Addendum No. 5

1.The bid opening time has changed from 1:30 pm to 3:00 pm for today, 8/29/2025.

Due to wvOASIS system limitations, online bid responses will not be able to be accessed.

Vendors may submit their proposal/information via email to Tara.L.Lyle@wv.gov before today's deadline at 3:00 pm. PLEASE PUT "CRFI SEC26\*01 RESPONSE" in the subject line.

If you have submitted an online response through wvOASIS - VSS, please resubmit your proposal by email to Tara Lyle at Tara.L.Lyle@wv.gov or you may fax the documentation to 304-558-3970.

No other changes.

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	One-Stop-Shop Permitting Program				

Comm Code	Manufacturer	Specification	Model #
43232408			

**Extended Description:**

One-Stop-Shop Permitting Program

**SCHEDULE OF EVENTS**

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
1	Question deadline	2025-07-24

**SOLICITATION NUMBER: CRFI SEC26\*01**  
**Addendum Number: 5**

---

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:**

1. The bid opening time has changed from 1:30 pm to 3:00 pm for today, 8/29/2025.

**Due to wvOASIS system limitations, online bid responses will not be able to be accessed.**

**Vendors may submit their proposal/information via email to [Tara.L.Lyle@wv.gov](mailto:Tara.L.Lyle@wv.gov) before today's deadline at 3:00 pm. PLEASE PUT "CRFI SEC26\*01 RESPONSE" in the subject line.**

**If you have submitted an online response through wvOASIS – VSS, please resubmit your proposal by email to Tara Lyle at [Tara.L.Lyle@wv.gov](mailto:Tara.L.Lyle@wv.gov) or you may fax the documentation to 304-558-3970.**

**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.

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: CRFI SEC26\*01**

**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 checked="" type="checkbox"/> Addendum No. 4	<input type="checkbox"/> Addendum No. 9
<input checked="" 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 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.

**Salesforce, Inc.**

\_\_\_\_\_  
Company

**Ryan Willett**

\_\_\_\_\_  
Authorized Signature

**8/29/25**

\_\_\_\_\_  
Date

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