

# MHBE Board Meeting

January 21, 2025

## Salesforce License Procurement

### **Presented by:**

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# The Salesforce Platform

The Salesforce platform is utilized for managing several business critical functions. In 2025, MHBE will be enhancing and integrating more applications.

- ✓ **Customer Relationship Management (CRM) Solution**
- ✓ Consultant Time Management
- ✓ Producers Operations Application
- ✓ Computer Telephony Integration (CTI)
- ✓ Procurement Requisition Application
- ✓ Carrier Data Integration Systems
- ✓ Live Chat Integration
- ✓ Appeals Portal
- ✓ Inventory Management System
- ✓ Automated Escalated Ticket Management process
- ✓ AI Agent Integration



# License Costs Comparison

Salesforce License Category	2024 Quantity	2025 Quantity	2024 Cost	2025 Cost (Estimated)*
Service Cloud Enterprise Edition and Government Cloud	450	425	\$1,086,227.10	\$1,102,531.08
Service Cloud Enterprise Edition Flex Users	200	100	\$56,593.07	\$27,899.77
Partner/Community Members	35	55	\$13,353.22	\$22,546.71
Customer Community Logins	4,000	2,000	\$17,725.23	\$11,889.33
Knowledge Enterprise Edition	2	2	\$1,828.99	\$2,170.14
Sandbox (Full Copy)	1	1	\$208,316.52	\$218,953.59
Data Storage	6	6	\$66,872.42	\$86,806.40
CRM Analytics (New)	-	5	-	\$12,093.34
Lightning Platform Starter (New)	-	170	-	\$37,544.37
<b>Total Salesforce License Renewal Cost</b>			<b>\$1,450,916.55</b>	<b>\$1,522,434.73</b>

# Funding for Software

IT software is federally funded at a rate of 75% of 88% of the total cost. This funding has already been allocated in the FY 2025 IT budget.

Funding Source	2024	2025	Increase
<b>Federal (66%)</b>	\$957,604.92	\$1,004,806.92	\$47,202.00
<b>State (34%)</b>	\$493,311.63	\$517,627.81	\$24,316.18
<b>Total</b>	<b>\$1,450,916.55</b>	<b>\$1,522,434.73</b>	<b>\$71,518.18</b>

# Procurement Summary

License Period (1 year) : March 2, 2025 - March 1, 2026

Procurement Method : Intergovernmental Cooperative  
Purchase Agreement Task Order  
Request for Quote (TORFQ)

Approved Reseller : Carahsoft Technology Corp

Cost of Licenses (2024) : \$1,450,916 (rounded)

Cost of Licenses (2025) : \$1,522,435 (rounded)

# Procurement Dates

Quote Received from Reseller	: 11/07/2024
Board Approval Request	: 01/21/2025
Issue Task Order (upon Board approval)	: 01/22/2025
Complete Procurement	: 01/31/2025

# Request for Approval

MHBE requests the Board to:

Exercise the Intergovernmental Cooperative Purchasing Agreement (ICPA) First Option Year Renewal with Carahsoft Technology Corporation.

And;

Award contract to Carahsoft Technology Corporation in the amount of \$1,522,434.73, with a Federal Participation of \$1,004,806.92 and State Participation of \$517,627.81 to procure the Salesforce licenses for the period of March 2, 2025 to March 1, 2026.