

ATTACHMENT D – PROJECT CAPABILITY SUBMITTAL CHECKLIST AND FORMAT

The Offeror must complete and submit this checklist along with the Project Capability (PC) Submittal. This PC Submittal Checklist is not counted in the 6-page PC Submittal limit. Failing to answer or answering “No” to any of the questions below may result in disqualification. Offerors may delete the example on attachments D1, D2, and D3 in order to meet the 2 page maximum requirement.

The templates in attachments D1, D2, and D3 MUST be used. Do NOT include any identifying information in the attachment D1, D2, and D3. Information listed under the “Documented Performance” line in attachment D1, D2, and D3 may describe where the Offeror has used the approach or solution previously, and what the results were in terms of verifiable metrics. Offerors may delete the example and this paragraph when completing this document.

Example of response to Attachment D1, D2, and D3 can be found in the Examples Template found in the Buyer Attachment Section of this solicitation.

1. Is your PC Submittal (attachments D1, D2, & D3) a total of 6 pages or less (2 pages maximum per document)?
 Yes No
2. Do you understand that your PC Submittal will NOT contain your firm’s name, specific names of past projects, or information that may be used to identify who your firm is, including employees’ names?
 Yes No
3. Do you understand that you have to use the PC Submittal templates provided in this RFP and that you are NOT allowed to re-create the PC Submittal Templates (cannot alter font size, add colors, add pictures, etc.) or handwrite your responses?
 Yes No
4. Do you understand that your Proposal may be disqualified if you fail to meet any of the above requirements?
 Yes No

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ATTACHMENT D (1) – LEVEL OF EXPERTISE (LE) Demonstration

Level of Expertise #1: GOVERNMENT EXPERTISE: Our team is dedicated to working with governments as they implement procurement through an online store. Our Public Sector team that includes a former White House senior procurement executive, a former State CPO, and the CPO from one of the largest counties in the US—understands the unique needs of government procurement.

Documented Performance: Our Project Manager has successfully launched and administered a public sector contract with OMNIA, helping customers meet their public procurement policies through a dynamic online store. We currently serve more than 18 states and over half of the 100 most populous local governments. In her previous role as State CPO, our State strategist saved \$100 million in her first year, conducted 40 reverse auctions, and streamlined the RFP process, reducing cycle time by a third. Our Government team appreciates the importance of change management when introducing new procurement methods, and this perspective will benefit Utah as you transition to this dynamic procurement model. A state CPO who recently onboarded with us said, “We always look for ways to make our processes more efficient, and save money for the State of Connecticut. We started working with [redacted] to give our agencies the familiar buying experience they use at home, but with the open, fair, and transparent process we need for state government. [Redacted]’s tools tailored for the needs of government customers was a great fit for us, and they had us up and running in 2 months with their onboarding assistance – it was the easiest implementation we’ve ever had.” Carol Wilson, Chief Procurement Officer – State of Connecticut

Level of Expertise #2: DYNAMIC eCOMMERCE EXPERTISE: We offer a transparent buying experience with hundreds of millions of products from hundreds of thousands of business sellers, and we have dedicated customer support to serve our customers.

Documented Performance: We are proud to serve millions of customers, including governments like the State of Oklahoma, the US Department of Homeland Security, and King County, Washington, along with hundreds of thousands of business sellers around the world with more than \$10 billion in annualized sales. We offer access to nearly 150,000 US business sellers and hundreds of millions of products. This results in the selection, convenience, and low prices that delight our government customers.

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Level of Expertise #3: EDUCATION EXPERTISE: In addition to our Government team, we have a team dedicated to Education customers. As a result, we have the personnel with expertise to effectively serve not only the government entities that may use the awarded contract, but also the school districts and higher education institutions. Our teams work together for a seamless customer experience.

Documented Performance: In the US, we serve nearly 80% of the 100 largest enrollment education organizations, including a large school district in Utah with over 50,000 students. By using our online store, this large Utah school district enjoys increased account visibility, operational efficiencies, and cost savings. The District Procurement Manager commented that our annual membership program “makes everybody’s life so easy and reinforces good purchasing practices.” He also stated, “Teachers buy just what they need, without adding extras, because they’re getting free, two-day shipping with any order. That saves a lot of money that can be put right back into the classroom.”

Level of Expertise #4: BROAD SELECTION: We offer a vast selection of business supplies from brands you know and trust.

Documented Performance: We have hundreds of millions of items across multiple business-related categories, including 1,100 items across five spend segments identified as business essential items, which have increased inventory and availability. Customers can activate recurring delivery for frequently purchased items so they never run out of stock. In addition, customers can create reorder lists for these items to minimize manual procurement effort. A ranking by Apruve, Inc. of 60 office supplies distributors—based on online user experience, B2B features, and marketing techniques—rated us number 1.

Level of Expertise #5: PROCUREMENT CONTROL: We understand government customers need controls in an online store to ensure adherence to their procurement requirements. We offer a variety of features for customers to gain oversight and management of spending across the organization. We also have a feature to allow customers to block any company who is listed on the federal SAM debarred company list. We have classified tens of millions of products into UNSPSC codes, which allow customers to curate their experience with us according to their procurement policies.

Documented Performance: We offer a variety of features for our customers to use, including: (1) tax-exempt purchasing for qualified organizations; (2) the ability to establish

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approval workflows before purchase; (3) the ability to guide buyers to appropriate purchases according to their policies, including restricting product categories (e.g., IT and Office Furniture), or preferring certain suppliers or products; and (4) spend reports to give you real-time data on spending across your state that includes more than 50 detailed data points like price paid, number of units purchased, and detailed product information.

ATTACHMENT D (2) – RISK ASSESSMENT (RA) PLAN

The Risk Assessment Plan should address the possible risks that the Offeror **does NOT control** when taking on this project. The descriptions should demonstrate the risks Offeror has encountered in similar projects, the solution to that risk, and the Offeror's documented performance with its solution including effects on the overall budget and timelines of the project. The risks should be prioritized (list the greatest risks first). The Offeror may add or delete Risk table templates, **but do not exceed the 2-page limit for this section.**

Risk #1 Description: An online store includes 3rd party sellers that offer products at market prices, which are subject to change. Product offerings and prices may fluctuate, so there is no guarantee that items that may have been purchased will be available in the future or at the same or lower price. 3rd party sellers may also manage returns, customer service inquiries, and fulfillment.

Solution: We have hundreds of thousands of business sellers globally, with more than 150,000 in the US, offering hundreds of millions of products to provide selection for our customers. We have a program that protects our customers when they purchase items sold and fulfilled by a third-party seller to cover both the timely delivery and the condition of the items, and provide functionality for customers to search for sellers that fulfil their diversity requirements (minority, women-owned, etc)

Documented Performance with Solution to Risk #1: A dynamic online store offers real-time competition with wide selection and purchasing efficiencies, driving total value benefits for our customers. It also provides access to the latest technologies and products, as well as options to help public sector customers wanting to direct spending to diverse sellers.

Risk #2 Description: We don't offer consolidated invoices.

Solution: We do not currently offer a 'Master Invoice Summary' as a separate document. Invoices are at the purchase level if all items ship within 5 days of the purchase date. However, we do provide real-time reporting of over 70 different transactional attributes. Once items are shipped, we send a copy of the invoice by email or via cXML integration. Customers can click on 'View Invoice' to see details on the invoice. We also accept procurement cards as a

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payment method.

Documented Performance with Solution to Risk #2: We are evaluating other potential consolidation-related features including periodic (e.g., monthly) invoicing and PO-level consolidated invoicing.

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ATTACHMENT D (3) – VALUE ADDED (VA) ITEMS

The Value-Added Items should identify any **value-added options or ideas that may benefit** the project. The value-added items should be prioritized (identify the most important claims first) and should provide examples of value added options that Offeror has implemented in other similar projects and the documented performance of each value-added item. The Offeror may add or delete Value Added Claim table templates, but **do not exceed the 2-page limit for this section.**

Value Added Item #1: Membership Program

How will this add value? Our membership program provides the customer access to (1) enhanced guided buying (the ability to guide buyers to certain products or sellers as well as restrict certain categories of spend); (2) enhanced spend visibility; and (3) unlimited free, 2-day shipping for over 100 million items and free same-day delivery or one-day shipping on eligible orders and (4) progressive discounts to ensure that customers buying large quantities of goods get the best price possible.

Documented Performance: Our membership program includes a data visualization tool (similar to Tableau, Quicksite, etc.). One customer has commented that “reporting on expenses used to be a time consuming, manual process. Now, we can evaluate spend data in near real-time and use as building blocks to prevent rogue spending. This has been just a huge, huge win.”

Cost Impact (%): We offer a Public Sector price plan for Government, Education, and Nonprofit customers at \$3,499 per year (vs. \$10,999 for other business customers) which also provides unlimited shipping for everyone on the account.

Schedule Impact (%): 68%

Value Added Item #2: Enhanced Guided Buying

How will this add value? Enhanced Guided Buying enables organizations to set their procurement preferences and create a tailored purchasing experience for their buyers, making it easy to adhere to an organization’s policies. It creates buying efficiency by “guiding” end users to approved products and reduces approval burdens with restricted product categories. The Admin can create policies with multiple attributes such as restricting a category such as IT and Furniture with a spend limit that triggers an approval workflow.

Documented Performance: Some of our government customers currently use this feature to restrict product categories that are available on their cooperative contracts. Other customers use this feature to direct spending to specified small, diverse, and local sellers.

Cost Impact (%): Guided Buying is a feature within our membership program. **Schedule Impact (%): n/a**

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Value Added Item #3: Punchout (Procurement Provider Integration) Benefits

How will this add value? Integrating your e-procurement system with your suppliers' catalogs helps to automate your procure-to-pay process and purchases within your e-procurement system.

Documented Performance: Integration streamlines the buying experience, eliminates paper-based processes, increases adherence to procurement policies, uses existing approval workflows, and reduces order cycle time. We integrate with over 90 e-procurement systems.

Cost Impact (%): There is no additional cost at this time. **Schedule Impact (%):** n/a

Value Added Item #4: Pay by Invoice (PBI)

How will this add value? PBI allows customers upon credit approval to improve cash flow by extending payment to 30 days past date of shipment.

Documented Performance: Our customers can pay for products using purchasing cards, PBI, or purchase order. Receiving credit or payment terms from businesses improves cash flow. Longer terms free up capital for day-to-day operations. Customers also gain control from payment terms, as they pay only when the goods are received and verified.

Cost Impact (%): There is no additional cost at this time. **Schedule Impact (%):** n/a

Value Added Item #5: Shopping lists for easy re-ordering

How will this add value? Administrators and requisitioners can create lists of items with or without quantities to create efficiencies in re-ordering items when supplies need to be replenished. These lists can be shared with other users and edited or deleted at any time.

Documented Performance: Our customers like the simplicity created by this easy re-ordering process.

Cost Impact (%): There is no additional cost at this time. **Schedule Impact (%):** n/a

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Attachment E – Marketing/Education Plan

Currently, we have five sales offices in the United States (Seattle, Boston, Detroit, Austin, Washington, D.C.) but we have the capability to serve public sector customers in all 50 states. We have a separate contractual relationship with OMNIA similar to the one proposed here and have successfully marketed, administered, and grown that contract for its use by thousands of customers. We will develop a similar go-to-market plan for this contract, which will include the following activities:

- 1) We will add this contract to our web-based cooperative homepage for the purpose of promoting its compliance offerings and on-boarding existing customers. The homepage will have a registration flow that will include a link for existing customers to utilize this contract.
- 2) We will proactively send email campaigns to relevant prospective and existing customers following the contract launch.
- 3) We will add this contract to our existing training program for our public sector sales force personnel to describe the benefits of this contract as well as the difference between it and other available contracts. We will also ensure that all public sector sales force personnel have completed such training within 90 days of contract launch. Thereafter, all new public sector sales force personnel will receive this training during new hire orientation.
- 4) We will attend several procurement events targeted at education and government agencies in an effort to reach thousands of purchasing administrators, buying influencers, and buying decision makers. For example, we regularly attend 7 national events including NASPO Exchange, NASCA, ASBO, NAEP, NACUBO, FETC, and NIGP Annual Meetings. We also attended or plan to attend more than 20 local, state, and regional conferences.
- 5) We will work to create a one-page marketing collateral document demonstrating the benefits of the agreement for use by our public sector sales force personnel.
- 6) We will meet with any associated cooperative's marketing team to discuss promotions and other campaigns and identify plans and opportunities to push activities out to Participating Public Agencies and webpage visitors.
- 7) We will support any associated cooperative's comprehensive marketing plan in support of the Agreement.
- 8) We will hold regular business reviews with key contract administrators and cooperative stakeholders to report on progress with contract adoption, marketing initiatives, and potential areas of concern.