



Memorandum

TO: HONORABLE MAYOR
AND CITY COUNCIL

FROM: Maria Öberg

SUBJECT: See Below

DATE: September 8, 2025

Approved

Date:

9/9/2025

COUNCIL DISTRICT: Citywide

SUBJECT: Report on Request for Proposal for the Implementation of the Salesforce Customer Relationship Management System

RECOMMENDATION

Accept this report on the Request for Proposal and adopt a resolution authorizing the City Manager or her designee to:

- (a) Negotiate and execute an agreement with Infinite Solutions, Inc. for the implementation of the Salesforce Customer Relationship Management system for an initial term, beginning on or about October 15, 2025, and ending on or about October 14, 2028, for an amount not to exceed \$2,095,800, subject to appropriation of funds;
- (b) Negotiate and execute amendments and change orders as required for any unanticipated changes during the initial term, subject to the appropriation of funds; and
- (c) Approve a contingency amount not to exceed \$526,950 for unanticipated changes during the initial term, subject to the appropriation of funds.

SUMMARY AND OUTCOME

This memorandum provides the City Council with recommended actions that will allow the City Manager or her designee to negotiate and execute an agreement with Infinite Solutions, Inc. for the implementation of an enterprise-wide Salesforce Customer Relationship Management system, in an amount not to exceed \$2,095,800. This initiative directly supports the City's strategic goal of improving service delivery by consolidating and connecting multiple fragmented customer service platforms into a single, unified solution. Following a competitive Request for Proposal process, including proposal evaluations, oral interviews, and Best and Final Offers, Infinite Solutions, Inc.

was selected as the top-ranked proposer based on technical capabilities, implementation approach, and overall value to the City.

BACKGROUND

The City currently does not have a unified system to track and respond to customer inquiries, with departments using disparate tools, such as unsupported customer relationship management systems and spreadsheets. The new Salesforce Customer Relationship Management system will consolidate customer information and improve response capabilities, supporting the City's Customer Service Vision and Standards adopted on March 7, 2023. This system will replace the existing SJ311 platform and provide enhanced features like multichannel case intake, real-time status updates, automated workflows, performance tracking, mobile access, and multilingual support. Implementation is expected to take up to 34 months. The result will be a scalable, integrated customer service platform that enables more consistent, transparent, and responsive services across departments.

While the agreement with Infinite Solutions, Inc. will cover the technical implementation of the Salesforce Customer Relationship Management system, it will not include services related to cultural and organizational change management. Those cultural and organizational change management services are critical for the successful implementation of the Customer Relationship Management system. To obtain these services, the City intends to engage the services of a consultant that it already has an existing Master Services Agreement with. A separate staff memorandum recommending funding for that Master Services Agreement is being brought forward concurrently for City Council consideration on September 30, 2025.

ANALYSIS

On December 13, 2024, the City issued Request for Proposals (PUR-RFP2024.12.10161) seeking a system integrator to implement Salesforce Customer Relationship Management through the City's e-procurement system, Biddingo. The Request for Proposals was viewed by 75 companies. A total of 18 proposals were submitted by the deadline, of which one was determined to be non-responsive.

Evaluation Process: The submitted proposals were independently evaluated and scored, in accordance with the evaluation criteria set forth in the Request for Proposals, by a four-member evaluation team comprised of representatives from the City Manager's Office and the Information Technology Department. Following initial scoring of proposal responses by the evaluation team, six firms were invited to oral interviews; three were then invited to submit best and final offers. Evaluation included

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responsiveness, qualifications, project approach, cost, and interviews. Infinite Solutions, Inc. received the highest score and is recommended for contract award.

Evaluation results are summarized below.

Category	Point Available	Accenture	Guidehouse, Inc.	Infinite Solutions, Inc.
Proposal Responsiveness	Pass/Fail	Pass	Pass	Pass
General Requirements	10	7	9	8
Experience and Qualifications	20	16	17	14
Project Approach / Schedule	25	17	19	18
Cost Proposal	15	7	6	15
Oral Interview / System Demonstration	20	14	11	15
Local Business Enterprise	5	5	0	0
Small Business Enterprise	5	0	0	0
TOTAL SCORE	100	66	62	70

Staff conducted reference checks on the proposed awardee with the Department of Water Resources, Department of Motor Vehicles, and California Department of Transportation. All references provided positive feedback.

Local and Small Business Enterprise Preference: In accordance with [City of San José Municipal Code, Section 4.12.320](#), 10 percent of the total evaluation points were reserved for the local and small business preference. One of the finalists requested and received the local business preference points.

Protest: The City's Request for Proposals process included a 10-day protest period that began when the City issued the Notice of Intended Award on July 22, 2025. No protests were received.

Award Recommendations: Based on these results, staff recommends award of contract to Infinite Solutions, Inc. as the highest-ranked responsive and responsible proposer based on the evaluation results.

Summary of Agreement: The agreement with Infinite Solutions, Inc. will be in accordance with the City's standard terms and conditions and include the following provisions:

- Detailed scope of work to ensure the provided services comply with City requirements;
- Project implementation plan/schedule; and
- Fixed, not to exceed pricing for the next five years through September 30, 2030.

EVALUATION AND FOLLOW-UP

No follow-up is required.

COST SUMMARY/IMPLICATIONS

The total recommended amount for this agreement is \$2,622,750. The initial implementation cost in the agreement of \$2,095,800 is to be funded by the General Fund. The remaining \$526,950 is subject to the appropriation of funds. The proposed agreement term is approximately 24 to 34 months.

Additionally, the City may want to amend the scope of work for the agreement in the future to include managed services and increase the agreement compensation for those costs. If there are any amendments to the agreement, those amendments will be brought forward to City Council and be subject to appropriation of funds.

1. AMOUNT OF RECOMMENDATION \$2,095,800 (Initial implementation plus five years of application development and customization)

2. COST ELEMENTS

<u>Initial Implementation</u>	
- One-Time Implementation Services	\$2,077,800
- 1 st Year Application Development/Customization	\$6,000
- 2 nd Year Application Development/Customization	\$6,000
- 3 rd Year Application Development/Customization	\$6,000
CONTRACT NOT-TO-EXCEED TOTAL	\$2,095,800
Contingency (subject to an executed change order or amendment)	\$526,950
TOTAL NOT-TO-EXCEED	\$2,622,750

BUDGET REFERENCE

The table below identifies the fund and appropriation to fund the agreement recommended as part of this memorandum.

Fund #	Appn. #	Appropriation Name	Current Total Appn.	Recommended Budget Action	2025-2026 Proposed Budget Page*	Last Budget Action (Date, Ord. No.)
001	218T	Customer Service Vision and Standards	\$3,475,000	\$2,095,800	823	6/17/2025, 31230

** The 2025-2026 Adopted Operating Budget was approved on June 10, 2025, and adopted on June 17, 2025, by the City Council.*

COORDINATION

This memorandum has been coordinated with the City Attorney's Office, the City Manager's Budget Office, and the Information Technology Department.

PUBLIC OUTREACH

This memorandum will be posted on the City's Council Agenda website for the September 30, 2025 City Council meeting.

COMMISSION RECOMMENDATION AND INPUT

No commission recommendation or input is associated with this action.

CEQA

Not a Project, File No. PP17-003, Agreements/Contracts (New or Amended) resulting in no physical changes to the environment).

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PUBLIC SUBSIDY REPORTING

This item does not include a public subsidy as defined in section 53083 or 53083.1 of the California Government Code or the City's Open Government Resolution.

/s/

Maria Öberg

Director, Finance Department

For procurement and contract related questions, please contact Albie Udom, Deputy Director of Finance – Purchasing and Risk Management, at albie.udom@sanjoseca.gov. For program related questions, please contact Dolan Beckel, Chief of Staff for the City Manager, at dolan.beckel@sanjoseca.gov or Khaled Tawfik, Director of Information Technology at khaled.tawfik@sanjoseca.gov.