	Offeror Questionnaire – Methodology	**STATE OF ARIZONA**
		Agency: **Arizona Dept. of Administration State Procurement Office (ADOA/SPO)**
		Customer: **WSCA participating states; AZ Statewide (state agencies & cooperative partners)**

Description: **WSCA Software Value-Added Reseller**

Instructions: Complete each item, using attachments where necessary. Attachments shall indicate the item number and heading being referenced as it appears below. Label your response "Questionnaire-Methodology-*companyname*" and indicate each question number as it is being addressed. Your narrative response is limited to twenty-five (25) pages, 8.5" x11", with one-inch margins and no smaller than Times New Roman number 12 or Ariel 9 font. Attachments are not included as part of this total. All materials must be in electronic format that can be received by ProcureAZ, the State of Arizona's electronic procurement system (see Special Instructions.) **ANY NARRATIVE LANGUAGE RECEIVED IN EXCESS OF THE PAGE QUANTITY INDICATED WILL NOT BE CONSIDERED AS PART OF THE PROPOSAL**.

METHODOLOGY – **Xerox Responses in bold**

1. Assume you recently received a contract as the sole Software Value-Added Reseller in a State (serving that State and its cooperative partners). Further assume: the State has multiple state agencies and multiple municipalities using that State's contract; the State and cooperative partners have separate volume license agreements and existing perpetual licenses; the State has an existing contract with a personal computer (hardware) provider which provides equipment already loaded with basic distributed software products.
    - DESCRIBE the actions you would take to establish yourself as that State's SVAR, with the central procurement office, and with individual using entities (e.g., a state agency and a coop partner such as a city). **Xerox is the Publisher and will be working directly with the State agencies and Municipalities.**
    - DESCRIBE how those actions may be modified if your contract were the first SVAR contract for that State. **Xerox is the Publisher and will be working directly with the State agencies and Municipalities.**
    - DESCRIBE your outreach to State and Cooperative Partner users. **As the states implement their Participating Addendum the local Xerox sales teams will develop their respective marketing plans which will include communication to all prospective entities. This Software contract compliments and enhances the Multifunction and the PC/Peripheral contracts of which we current awardees. Additionally the required website for the Software contract will also serve as a marketing tool.**

2. Contractor is required to provide a website for each participating state. Describe the website you would establish for a State and that website's functionalities or special features. You can supplement this response with illustrative page shots (no more than 10) from one of your existing websites. Please address, at a minimum:
    - Home page appearance and information – **Websites for this contract will be patterned after other Xerox WSCA websites. Please review the following site to provide a good representation of a planned website. www.portal.xerox.com/wsca**
    - On line tutorials – **DocuShare offers a full online tutorial for the administration and usage of the product. Both existing customers and prospective customers can utilize the tutorial and the address is as follows**; http://docushare.xerox.com/resource/resource_training_eleaning_reg.html Product catalog (include searchable fields, which products you would include, how VLA information is provided) The product catalog for the website will include all available product literature from brochures, to product guides, to installation documents to demonstration videos, to tutorials, etc.
    - Links - **Tutorials for DocuShare software, can be accessed through the following link which can be available on the website as discussed above: http://docushare.xerox.com/resource/resource_training_elearning_reg.html. Information regarding the proposed DocuShare software can be obtained from the following link:** https://docushare.xerox.com/doug/dsweb/View/Collection-13638
    - Downloadable standard reports, if any. Include how information is controlled and sorted (e.g., how can Tempe, AZ obtain only their information, how can Procurement Officer of contract obtain a purchasing profile for users and volume in State). **Xerox will generate a quarterly WSCA Master Sales/Rebate Report. This report will be sent to WSCA as well as sorted and sent to each specific state. Although the reports are generated quarterly, they may be available on a monthly basis as required. Additional reports or customization of reports can be determined based upon specific requirements for an optional fee. All software licenses are tracked within an existing Master Customer database. Data is input as orders are generated and all on-going activity is continually captured regarding license renewals, upgrades, etc.**
    - How website is monitored, kept current and accurate –**Xerox has our own E-Commerce organization that provide all website creations and updates as requested by the Xerox Contract Manager for this contract. Once a request is made the E-Commerce system will automatically update all pertinent sites.**

3. Describe your method for tracking software licenses and ensuring that Participating Entities (PE) receive timely notifications of renewals or are advised of volume agreements opportunities or vulnerabilities, etc. Please address, at a minimum:

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- The standard sort-able data fields you establish for these records – **Data fields will be customized to fit the mutually agreed upon requirements based upon the sample report fields attached.**
- The information you track on behalf of Participating Entities. **Same as above.**
- How reminders of significant dates or volume plateaus are triggered and how your organization, as a partner with a PE, works with the PE to ensure no deadlines are missed or opportunities unexplored. **These activities are a standard part of the on-going installation/account support provided by Xerox. Quarterly reports also support critical information. See above #3.**

4.   Describe standard reports which you can generate for a PE (other than downloadable reports addressed earlier) and provide sample reports as examples. Describe and provide examples of Optional Reports which you could provide and provide pricing in the Offeror – Pricing attachment. **An example of our standard report is attached to provide the types of fields that can be included. Also note that the report will have a total of all billings and the rebate amount for WSCA as well as any applicable states who have added their own administrative fee.**

5   Explain your method of ensuring a PE will receive and can provide proof of licenses. Include in your response:
- Describe how you provide a Proof of License certificate to a buyer. Also, provide sample(s) of a Proof of License such as you would provide. **When DocuShare is purchased the customer will receive a physical CD with the installation files for DocuShare as well as an e-mail with the license for the product. The license is an alphanumeric string that will be applied inside of the DocuShare licensing manager.**
- Explain your method of retaining back-up copies of Proofs of License; and how, and how quickly, you could provide duplicate copies as needed. **All records of the license purchase is maintained in Xerox's customer database. Requests for relicensing can be satisfied within the same business day.**
- Describe how you partner with a PE to demonstrate accuracy of licensing information to a publisher (e.g., True Up). n/a **Xerox is the Publisher and will be working directly with the State agencies and Municipalities.**

6.   Describe how you work with a PE and publisher to maximize the Entity's value in obtaining products and services under this contract. Description is to address, but is not limited to, the following:
- Working with a PE and a publisher to assist the Entity in best managing their volume or enterprise license agreements. **Xerox software licenses are managed by the customer: however, Xerox can train entity personnel how to monitor existing license utilization**.
- Working with a State and publisher to maximize the leverage created by the total sales volume from a State and its cooperative partners to ensure best value to all PE's. **As Xerox is the publisher it will be a single source relationship for all aspects to insure best value to the PE.**
- Working with a publisher to maximize the leverage created by the total sales volume overall resulting from this contract. **These activities are a standard part of the on-going account management activities provided by Xerox.**
- Working with a PE and publisher to obtain the best quote on a high volume purchase . **As the publisher with full pricing authority, Xerox will work directly with the PE to obtain the best quote for an high volume purchase.**
- If, and how, you use historical purchase information to provide targeted assistance to a PE. **This is part of the standard on-going support to our customers.**
- Assuming a software configuration is not within the knowledge or authority of your organization, describe how you could assist a PE in finding a solution (i.e., helping PE obtain needed configuration assistance from the publisher or designee.) **N/A Xerox is the publisher with the knowledge resources and authority.**
- Explain how you would 'price out' such assistance. **Xerox offers guidance and solution assistance during the presale phase. Should extended assistance be required in the form or an analysis or study, this would be at an optional cost agreed upon by Xerox and the PE under the pricing guidelines of the contract.**
- Explain the training you could provide (other than online tutorials) to assist PE's in using this contract and obtaining best value from it. **Xerox offers a range of training support based upon the software solution, environment and predetermined objectives. Xerox offers both online (e-learning) and/or in person training activities that will be mutually determined in the installation planning session.**

7.   This contract has a maximum life of five (5) years, the technology field is a fast evolving one, and the potential volume under this contract is beyond any single entity contract.
- How would you improve the value of this partnership, over time, during the life of the contract? **This is part of the standard on-going support to our customers.**
- We require the successful contractor(s) to retain publisher certification levels, to improve upon them, to work to reduce their costs to obtain publisher products, etc. Explain your processes to meet these requirements. **N/A Xerox is the publisher.**

- How would you partner with the Procurement Officer and Participating States to adapt to changes and keep the contract viable? **Xerox will assign a Single Point of Contact who will be responsible for contract support and provide on-going communication cadences. A formal process will be developed upon award as has been the process for other WSCA contracts.**

- As this is a contract which is expected to be used by many states, there is potential for a level of value and partnership – considering market information, volume, extended relationships with publishers, shared standards, etc. – beyond that provided by a single State or PE contract. What extra services or value do you feel you could provide given this expanded user and volume base? **Xerox currently serves 160 countries; Xerox is capable of serving each Participating Entity of the WSCA contract. We extend our global reach through wholly-owned subsidiaries of regional office technology dealers, as well as more than 6,500 authorized sales agents and concessionaries and about 10,000 technology resellers. We are allied with IT and business partners that integrate our systems and services into customer solutions.**

8. What performance measures would you establish to ensure yourself and users of this contract that you are, at a minimum, meeting the requirements of this contract, providing cost-savings solutions, and realizing a high level of customer satisfaction. Describe your methods of defining and tracking your performance against specific measurable objectives. Provide copies of any reports you may have developed that communicate your performance levels to customers. **This response is dependent on the scope and extent of the software installation. For example, based on the size of the installation a formal Statement of Work may be created that outlines the scope of the project. Inside of the SOW, WSCA and Xerox will agree upon solution delivery and metrics for success. Before an engineer leaves an installation a "Customer Acceptance" document will be signed by WSCA. This signature verifies that the installation was performed to the specifications of the SOW and authorizes Xerox to bill for services performed. After the initial installation is complete for a particular project, Xerox will continually work with entity staff to identify new areas of opportunity to better leverage the solution. If a project is identified, another SOW will be created.**

9. We have requested information about optional reports (Question #4), about functions you could serve to assist in more complicated configurations (Question #6), and in providing extra value possible given the potential magnitude of this solicitation (Question #7). Please use this item as an opportunity to describe other value-added services you can provide that were not specifically required in this solicitation, but are consistent with its intent. Please advise the cost for the services you describe in the Offeror – Pricing attachment, or advise if they are included at no additional cost. **Xerox Methodology focuses on achieving smarter documents (those which contain structured information to assist with document retrieval, distribution and manipulation). These smarter documents allow for more competitive businesses, combining intelligent human processing with the number crunching and communication facilities of computers and networks. Fluid document sharing across different media can close the processing gap between paper and digital documents, while connecting the information contained with other critical information systems. The foundation for smarter documents and their management requires R&D investment and insights from two complementary aspects: work practices and technology. Through interviews and workshops, written diaries and video records, researchers at the Xerox Palo Alto Research Center (PARC) have developed a deeper understanding of how people work. This provides the basis for developing technologies and solutions tailored for customer needs and that truly improve efficiency. Many studies have been conducted over the past three decades to analyze how information flows and how documents and their technology infrastructures are part of the IT environment. This understanding has generated technology to activate the information embedded in unstructured documents, and make it accessible as part of efficient business applications and more productive operations. Some of these studies have focused on:**

  - **Understanding in which settings office workers prefer to use paper documents over electronic, and how they interact**
  - **Understanding real business productivity opportunities resulting from reducing redundancies and errors associated with document intensive work**
  - **Identifying ways mobile users can interact with stationary office devices to deliver increasingly sophisticated document services**
  - **Analyzing how to best use, and proactively administer and maintain technology infrastructures to reduce user intervention**

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Smarter Document Management for the office environment helps organizations move to more cost-effective document information and process management.