



## Request for Proposals for Sales and Customer Service Training

May 24, 2018

## 1 Introduction

The Illinois Department of Lottery [www.illinoislottery.com](http://www.illinoislottery.com) awarded the Private Management Agreement (“PMA”) to Camelot Illinois on September 22, 2017 following a bid submission. Following the Notice of Award, the PMA was executed on October 13, 2017.

Camelot Illinois, as part of an overall business strategy, intends to assist the Lottery in growing revenue. As such, the goal of this Request for Proposals for Sales and Customer Service Training (“RFP”) is to enter into a contract with a company (“Supplier”) for the development and delivery of coordinated training and professional development services for the State’s Lottery Sales Representatives (“LSRs”) and Tel-Sell Customer Service Representatives (“CSRs”).

The work to be performed includes the following:

- Development of a training plan
- Development of a curriculum design
- Delivering the curriculum/program; and
- Travel to locations around the state to deliver the training program.

Camelot Illinois anticipates that the training will encompass an initial assessment to determine the strengths and opportunities for development of the LSRs’ and CSRs’ skills. After the initial assessment, a customized training program will be implemented that will include training in various areas, including customer service, time and territory management, effective prospecting, goal-setting and strategy, negotiations with customers, and closing techniques. (collectively, the “Services” -See Section 7 of this RFP ).

## 2 Instructions

This RFP invites interested organizations to submit a response (“Proposal”) to Camelot Illinois.

The requirements for the Proposal are set forth in Section 7 of this RFP.

### 2.1 Timetable

Proposals should be submitted by June 25, 2018 at 12:00 pm CT to the attention of:  
[procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com)

**The RFP milestones are as follows:**

Issue RFP	May 24, 2018
Last date to submit questions	June 5, 2018 by 5:00 pm CT
Answers to Vendor questions posted	By June 12, 2018
Vendor intends to submit a Proposal	June 18, 2018 by 2:00 pm CT
<b>Proposal submission date</b>	June 25, 2018 by 12:00 pm CT
Presentations (if any)	July 9 and 10, 2018
<i>Estimated Date of Award</i>	July 16, 2018
<i>(subject to contract)</i>	

Camelot Illinois reserves the right to make any necessary amendments to the above timetable. Please periodically check the Illinois Lottery website under the Business/Procurement Opportunities tab<sup>1</sup>. Any changes will be posted on the Illinois Lottery website. Companies that submit Proposals (“Vendor”) will be notified in writing of any changes to these dates. Proposals submitted late will not be considered.

## 2.2 Contacts

Please submit any questions via email to [procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com). Questions regarding this RFP must be emailed before June 5, 2018 by 5:00 pm CT. A consolidated response to any questions will be posted on the Illinois Lottery website under the Business/Procurement Opportunities tab and be made available to all Vendors without identifying the Vendor that asked the question. Camelot Illinois reserves the right to decline to answer specific questions.

## 2.3 Vendor Intends to Submit a Proposal

Vendors are required to notify Camelot Illinois that they intend to submit a Proposal via email to [procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com) by June 18, 2018 by 12:00 pm CT.

## 2.4 Vendor Presentation

The top two (2) scored vendors may be given the opportunity to make a presentation to demonstrate that they are able to fulfill Camelot Illinois’ training requirements as outlined in Section 7 of this RFP. All meetings will be limited to two ( 2) hours or less and apportioning of time should be taken into account.

Arrangements will be made following receipt of Proposals.

## 2.5 Response Format

Please provide the following information on the cover page of Vendor’s Proposal and ensure that the Vendor’s name appears on each subsequent page of the document:

- A. Vendor’s Name
- B. Vendor’s Address
- C. Contact Name
- D. Contact Job Title
- E. E-mail Address
- F. Telephone Number

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<sup>1</sup> [http://www.illinoislottery.com/en-us/Business\\_Procurement\\_Opportunities.html](http://www.illinoislottery.com/en-us/Business_Procurement_Opportunities.html)

Ensure that Vendor's Proposal follows Camelot Illinois' format (e.g., numbering answers in the format of this document). Failure to do so may result in the Proposal being misinterpreted or missed. Please answer all questions fully. Proposals should be delivered in electronic format via email to [procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com).

The Proposal should explain how the Vendor could support Camelot Illinois in the achievement of its objectives.

Where possible, the Proposal should also include the following:

- A. Innovative ideas on meeting Camelot Illinois requirements;
- B. Why Camelot Illinois should choose the Vendor; and
- C. How the Vendor's service offering differs from the competition.

## 3 Conditions of the RFP

### 3.1 General Considerations

The issuance of this RFP does not constitute a legal offer capable of acceptance.

Camelot Illinois reserves the right to reject any or all of the Proposals submitted or to withdraw this RFP at any time. Camelot Illinois also reserves the right to accept a Proposal from Vendors in part only.

Camelot Illinois will not be liable for any costs incurred by any Vendor in connection with the preparation of a response to this RFP or for any costs incurred for attendance at meetings, presentations, clarifications, or demonstrations.

The numbering of this RFP is an important aid in the evaluation process. Please utilize it within the Proposal, as this may affect Camelot Illinois' evaluation of it.

Prospective Vendors may not take advantage of any apparent error or omission in this RFP. In the event that any errors or omissions are discovered, a Vendor shall notify Camelot Illinois immediately.

Please provide complete and accurate information against the specifications contained within this RFP. If Vendor is unable to meet any requirements, then this should be clearly noted in the appropriate response section(s). Any assumptions within the Proposal should be clearly stated.

Any commitment made in a Proposal shall be binding on the applicable Vendor. A commitment includes any guarantee or representation made in the Proposal, accompanying documentation, or subsequent negotiation.

### 3.2 Confidentiality

Subject to Appendix A - Private Manager Agreement Incorporated Terms ("PMA") of this RFP, any information disclosed in, or in connection with this RFP becomes the property of Camelot Illinois, subject to Vendor's redaction of confidential, proprietary, or other sensitive material in accordance with the PMA and State Policies and Rules (defined in the PMA). Such information will be available to

the public in accordance with State Policies and Rules. However, the failure to designate any materials as “proprietary and confidential” at the time of delivery of such information to Camelot Illinois does not prohibit the Vendor from subsequently designating any information as proprietary and confidential. However, this designation does not necessarily exempt such information from disclosure under the Freedom of Information Act, 5 ILCS 140/1 *et seq.*

### 3.3 Employment

From the time this RFP is issued until either (i) six (6) months after the award of a contract pursuant to this RFP or (ii) the rejection of all Proposals received by Camelot Illinois, Vendors are prohibited from officially or unofficially making any employment offer or proposing any business arrangement with Camelot Illinois’ employees.

### 3.4 Compliance

Failure to comply with any specific instructions detailed in this RFP may, at Camelot Illinois’ discretion, exclude the Vendor from further consideration in the process.

### 3.5 Selection of Vendor

Any Proposal that materially fails to meet the requirements set forth in this RFP will be disqualified.

The table below defines the evaluation criteria and the relative importance of each criteria that will be used to evaluate the Proposals. The requirements are identified in Sections 6 and 7 of this RFP.

Proposal Elements	Relates to requirements	Maximum # of Points Possible
Company Information	C-1 to C-8	5
Background and Experience	R-1 to R4	15
Curriculum	R-10 to R-26	50
Account and Relationship Management/References	R-30	15
Overall price, pricing model, and value for money	Sec. 8.1	15
	<b>Total</b>	<b>100</b>

Camelot Illinois reserves the right to adjust selection criteria until June 15, 2018. Any such changes will be posted on the Illinois Lottery website no later than June 16, 2018 to permit any necessary refinement of Proposals prior to submission. For all Vendors who have submitted notice of an intent to submit a Proposal, Camelot Illinois will notify them of all changes via email.

Camelot Illinois’ decision on the Supplier will be determined by the highest overall score(s) achieved based on the above criteria and, if appropriate, updated following any presentations. Camelot Illinois’ decision will be final.

## 3.6 Terms and Conditions

Vendors should note that any contract award will also be subject to Camelot Illinois' terms and conditions.

Camelot Illinois operates within a regulated environment, and it is a requirement of the PMA that Vendors be vetted or approved by the State regulator in advance. Accordingly, the Supplier must complete State disclosure and certification documents (<https://ipg.vendorreg.com/>). For further information about this requirement, please contact, Procurement Services at [procurement-services@camelotillinois.com](mailto:procurement-services@camelotillinois.com).

The PMA requires Camelot Illinois to pass through various non-negotiable provisions, specifically the Private Manager Agreement Incorporated Terms ("Incorporated Terms"), to all Suppliers. Camelot Illinois will achieve this by adding a separate exhibit with the Incorporated Terms onto each Supplier's contract. The Incorporated Terms will take priority over any conflicting term in the rest of the contract. Refer to Appendix A of this RFP for a final version of the Incorporated Terms.

From the time this RFP is issued until the end of the contract term, each Supplier represents and warrants that it shall neither be (i) debarred or prohibited from doing business with the State of Illinois for any reason; nor (ii) likely to have a material and/or adverse effect on the interests of the Illinois State Lottery.

Camelot Illinois is looking to establish a contract with a Supplier for a term of approximately one (1) year, subject to the Supplier's performance and Camelot Illinois' evolving requirements and strategy.

## 3.7 Validity of Proposal

Proposals shall be binding offers, binding for a period of ninety (90) days from the date the Proposal is submitted.

## 4 Estimated Timings

### 4.1 Start of the Training Services

The initial training will commence in the Summer of 2018 and the remaining training will be staggered on a monthly basis over the course of a six- to eight-month period in 2018-19.

## 5 Response Approach and Format

Vendors are requested to provide the following:

- A. A completed version of the Company Information section with brief responses;
- B. A completed version of the Requirements section with full responses against each requirement (where applicable); and
- C. A completed pricing schedule estimate with any variation included at the end.

Where necessary, Vendors may supplement responses with additional material but should ensure that the material focuses on the information requested and references the section for which it applies. Camelot Illinois may be unable to search through generic material to attempt to find relevant information.

If the Vendor needs to exclude some requirements from its Proposal, this should be accompanied by a clear statement of which items are excluded and why.

If the Vendor wishes to propose additional services, not mentioned in the requirements in order to supply a full-service solution, please provide a clear statement of which additional items are included and why.

## 6 Company Information

Please provide the following information about the Vendor:

#	Company Information	Response
C-1	Vendor's name.	Answer in Full
C-2	Vendor's background, including details of ownership.	Answer in Full
C-3	Current number of employees.	Answer in Full
C-4	Annual turnover rate for each of the last three (3) years.	Answer in Full
C-5	Current number of part-time employees.	Answer in Full
C-6	Please summarize Vendor's experience relevant to the requirements in the form of a general capabilities overview.	Answer in Full
C-7	Strengths and points of difference from Vendor's competitors.	Answer in Full
C-8	<p>Please describe the resources that will be allocated to support Camelot Illinois and Vendor's overall organizational structure.</p> <p>Note: Day-to-day involvement with Camelot Illinois should make up a significant part of the presentation team.</p>	Answer in Full

## 7 Requirements

Please provide responses to the following general requirements:

For the Acknowledge Only requirements (i.e., R1-R12), Vendors shall acknowledge the requirements by either responding “Accept” or “Reject” for the requirement. If a Vendor rejects a requirement, then any mitigating circumstances or alternative approaches may be offered, however they may not be accepted as compliant. For the remainder of the requirements, please provide a full response.

#	Background & Experience	Response
R-1	Vendor must be in business for at least one (1) year.	Acknowledge Only
R-2	Vendor must have expertise in both qualitative and quantitative methodologies.	Acknowledge Only
R-3	Vendor must have sufficient staff to travel monthly to the following Illinois locations from Tuesday through Friday: Des Plaines, Rockford, Fairview Heights, and Springfield.	Acknowledge Only
R-4	Vendor must understand and accept without changes the Incorporated Terms located in Appendix A.	Acknowledge Only

#	Curriculum	Response
R-10	Vendor will create and provide an assessment that training participants can complete on an iPad in less than 30 minutes.	Acknowledge Only
R-11	Camelot Illinois will own the results of any assessment administered.	Acknowledge Only
R-12	Training for both the LSRs and CSRs will include a debrief of the assessment results and a Manager toolkit that instructs managers on how to lead their teams more effectively.	Acknowledge Only
R-13	Provide a brief summary of Vendor’s sales and customer service assessments.	Answer in Full
R-14	Provide a brief summary of Vendor’s customer service training.	Answer in Full
R-15	Provide a brief summary of Vendor’s sales skills development training.	Answer in Full
R-16	Provide a brief summary of effective prospecting/territory management training.	Answer in Full
R-17	Provide a brief summary of brand advocacy training.	Answer in Full

R-18	Provide a brief summary of training on how to handle challenges.	Answer in Full
R-19	Provide a brief summary of training on effective communication.	Answer in Full
R-20	Provide a brief summary of understanding customer priorities training.	Answer in Full
R-21	Provide a brief summary of proposal writing training.	Answer in Full
R-22	Provide a brief summary of strategy training.	Answer in Full
R-23	Provide a brief summary of closing techniques training.	Answer in Full
R-24	Provide a brief summary of training on sales best practices.	Answer in Full
R-25	Training must be scalable to fit various levels of need with appropriate notice.	Answer in Full
R-26	Training materials for each participant (and Camelot staff) must be included in the overall training package.	Answer in Full
<b>#</b>	<b>Account &amp; Relationship Management / References</b>	<b>Response</b>
R30	Provide at least one (1) letter of recommendation from a current client that speaks to creating long-term sustainable growth and increasing sales, strong client management and relationship building.	Answer in Full

## 8 Price

### 8.1 Pricing

All prices should be quoted in USD.

Proposals must include pricing for a six- to eight-month flexible, customized sales and customer service training program as described in Section 7 Requirements.

Please provide as much background as possible on the pricing, including any explicit assumptions, related to these metrics, the requirements, and any factors outside of this RFP.

It is anticipated that requirements may change to meet service needs over time, so any limits, constraints, and areas where flexibility is included in the pricing schedule should be highlighted.

Please include any estimated travel, hotel, and other reimbursement expenses in the Proposal.

#	Pricing Model and Value for the Money	Response
Sec. 8.1	<p>Pricing should include:</p> <ul style="list-style-type: none"> <li>- a six- to eight-month flexible training program (based on the Requirements).</li> <li>- Training materials for approx. 62 LSRs, 17 CSRs; and 10 Camelot staff.</li> <li>-Vendor to provide Camelot with a debrief report on the assessments.</li> <li>- Estimated travel expenses include mileage, hotel, per diem</li> </ul> <p>Note: Camelot Illinois will own the assessment results. (See R-11).</p>	Answer in Full

## 9. Business Enterprise Program (“BEP”)

Camelot Illinois is encouraging BEP (i.e., minority-owned, women-owned, and people with disabilities-owned businesses) to submit Proposals for participation in this procurement. Please visit the Illinois Department of Central Management Services website at <https://www2.illinois.gov/cms/business/sell2/bep/Pages/Default.aspx> to learn more about this program and/or register, if you have not so already.

## Appendix A - Private Manager Agreement Incorporated Terms

See the separate pdf file available on the Illinois Lottery website, reference - Private Manager Agreement Incorporated Terms.