



Assignment 2: Tender Appraisal

SalesForce RFT

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2 EXECUTIVE SUMMARY

This report presents an evaluation of three tenders received for the UTS Salesforce Support Professional Services contract. After a comprehensive assessment of each proposal against the stated evaluation criteria, including corporate capability, strategy and governance, implementation, risk, support capability, and pricing, EduTech Partners is recommended as the preferred supplier.

3 INTRODUCTION

This report evaluates the responses received from the three vendors, CloudReach Consulting, EduTech Partners, and Digital Synergy Solutions, as part of the UTS Salesforce Support Professional Services Request for Tender (RFT). Each response been evaluated critically considering evaluation criteria, utilising weighted decision matrices, financial calculations and risk analysis that considers both qualitative and quantitative measures. The assessment covers all key criteria detailed in section 2 of the RFT and presents open issues to each vendor. The goal of this report is to provide a clear, evidence-based recommendation to assist UTS in the selection of the most suitable partner.

4 EVALUATION OF TENDERS

4.1 MANDATORY REQUIREMENTS FOR RFT

4.1.1 Critical Evaluation

Only CloudReach Consulting (CR) and EduTech Partners (ET) successfully comply to mandatory requirements as set out in RFT. By comparison, Digital Synergy Solutions (DS) fails to have detailed responses in all Requirements sections and omits and an explicit response in others, specifically Strategy and Governance. For this reason, DS fall short and should be considered as such.

Of the three, CR presents exceeding adherence to the Mandatory Requirements and therefore may be considered as best fulfilling this section.

Key analysis:

- CR team of 180 experts in salesforce (140+ in Sydney), 45 in higher education
- ET 65 experts in higher education in Sydney.
- CR and ET both clearly present two \geq \$500 million clients (Monash University and UNSW, ANU and University of Melbourne) respectively in higher education.
- DS Smaller team (25 in Sydney) generic skillsets, may not meet the depth required.

CR present the largest Sydney based team however have fewer higher education experts.

4.1.2 Decision Matrix

Weighted decision matrix:

Criterion	Description	Weight
Mandatory requirement 1	Must provide detailed responses to all the Requirements of this RFT.	20%
Mandatory requirement 2	Must have a minimum of five (5) years' demonstrable experience.	20%
Mandatory requirement 2a	Two (2) \$500 Million revenue p.a. Salesforce services clients... (2.1.2.a)	20%
Mandatory requirement 2b	An established in-house onshore team...(2.1.2.b)	20%
Mandatory requirement 2c	Two (2) referees relating to each of the client citations above (2.1.2.c)	20%

Assessment:

Criterion	CloudReach Consulting	EduTech Partners	Digital Synergy
Mandatory requirement 1	5	5	2
Mandatory requirement 2	5	5	3
Mandatory requirement 2a	5	5	5

Criterion	CloudReach Consulting	EduTech Partners	Digital Synergy
Mandatory requirement 2b	5	4	3
Mandatory requirement 2c	5	5	5
TOTAL:	25/25	24/25	18/25

Scoring key:

- 1 = Poor (Does not meet requirements)
- 2 = Fair (Meets some requirements with significant gaps)
- 3 = Good (Meets most requirements adequately)
- 4 = Very Good (Exceeds requirements in some areas)
- 5 = Excellent (Exceeds requirements significantly)

4.2 CORPORATE CAPABILITY

4.2.1 Critical Evaluation

Both CloudReach and EduTech clearly articulate corporate capability to effectively to facilitate the Scope of Requirements. It is seen however that EduTech is most aligned with UTS's needs. They offer extensive and exclusive higher education sector expertise, explicitly detail Australian and international university implementations, and address every corporate capability sub-criterion with tailored responses. For instance, they provide a robust support structure with a Higher Education Strategy Advisor, strong value-add mechanisms like benchmarking programs and education-specific frameworks and confirms a scalable team of experienced consultants.

EduTech's education-specific methodologies, change management approaches, and participation in global Salesforce education forums place it well above CR and DS in strategic fit and domain relevance. These aspects speak to their commitment of competence and promoting sustainable practices, heeding values put forward by the EA Code of Ethics (Codes 2 and 4) and clearly outlines their strong project management capability and should be considered as such.

By comparison, CloudReach has vast experience in other sectors. Their capability and adaptability therefore should be considered as significant from their other experience, but also, they lack in exclusive higher education industry company positioning. Additionally, their response lacks specificity on value-add activities for nurturing long-term partnerships (e.g. training programs, dedicated resources) outside of their additional experience. It should be noted that they are a Salesforce Summit partner and therefore have excellent integration with Salesforce roadmaps and new features.

Digital Synergy Solutions, despite offering innovative approaches and competitive pricing, lacks direct experience in the higher education sector and provides a more generic methodology. This lack of sector-specific knowledge and limited evidence of tailored support structures represents a significant risk to UTS.

4.2.2 Decision Matrix

Weighted decision matrix:

Criterion	Description	Weight
Corporate capability criteria 1	Articulate the capability of your organisation ... (2.2.1)	20%
Corporate capability criteria 2	Outline the support structures in place within your organisation ... (2.2.2)	20%
Corporate capability criteria 3	Demonstrate the capability of your organisation to provide role-specific knowledge transfer... (2.2.3)	20%
Corporate capability criteria 4	Articulate how your organisation participates in industry forums... (2.2.4)	20%
Corporate capability criteria 5	Confirm the availability for commencement of an Enterprise B2B CRM ... (2.2.5)	20%

Assessment:

Criterion	CloudReach Consulting	EduTech Partners	Digital Synergy
Corporate capability criteria 1	5	5	3
Corporate capability criteria 2	4	5	2
Corporate capability criteria 3	5	5	2
Corporate capability criteria 4	5	5	2
Corporate capability criteria 5	5	5	4
	24/25	25/25	13/25

Scoring Key:

Refer 4.1.2.

4.3 STRATEGY AND GOVERNANCE

4.3.1 Critical Evaluation

Cloudreach and EduTech both deliver strong, higher education-focused case studies with clear strategic outcomes, though EduTech demonstrates slightly greater alignment with university governance structures and platform maturity through tailored methodologies and more explicit framing for academic contexts, naturally suiting the needs of UTS better than Cloudreach. Similarly, their platform management maturity section introduces a bespoke university-focused product management framework, which is more tailored than Cloudreach's generalist approach. EduTech's address to UTS 2027 is thorough and explicitly structured around each strategic objective, with clear alignment and practical strategies.

By contrast, Cloudreach's governance section is highly detailed, addressing all sub-criteria (a–d) with structured mechanisms like steering committees, architecture boards, and skills transfer plans. Their approach to emerging product/platform maturity is sound, emphasising incremental implementation and mentoring. Their response to UTS 2027 strategy is quite comprehensive, directly mapping CRM outcomes to each pillar, though some details could be made clearer.

Digital Synergy failed to explicitly respond to Strategy and Governance requirements, resulting in poor performance across all criteria.

4.3.2 Decision Matrix

Weighted decision matrix:

Criterion	Description	Weight
Strategy and Governance Criteria 1	Strategy: Provide two (2) recent case studies... (2.3.1)	25%
Strategy and Governance Criteria 2	Governance: What are the frameworks... (2.3.2)	25%
Strategy and Governance Criteria 3	How does your organisation work within. (2.3.3)	25%
Strategy and Governance Criteria 4	How would your organisation address... (2.3.4)	25%

Assessment:

Criterion	CloudReach Consulting	EduTech Partners	Digital Synergy
Strategy and Governance Criteria 1	5	5	1
Strategy and Governance Criteria 2	5	5	1
Strategy and Governance Criteria 3	4	5	1
Strategy and Governance Criteria 4	5	5	1
	19/20	20/20	4/20

Scoring Key:

Refer 4.1.2.

4.4 IMPLEMENTATION, RISK AND SUPPORT CAPABILITY

4.4.1 Critical Evaluation

Cloudreach and EduTech both demonstrate highly capable implementation, risk, and support capabilities tailored to the higher education context, with clear adherence to Salesforce best practices, strong accessibility integration, and robust managed services. EduTech edges slightly ahead in education-specific tailoring, particularly with its academic calendar-aware approaches and governance integration. Cloudreach's response is equally strong, offering validated results across multiple universities with clear performance metrics. In contrast, Digital Synergy presents an innovative but generic methodology lacking Salesforce specificity or practical examples, resulting in lower confidence in its suitability for UTS's academic environment.

4.4.2 Decision Matrix

Weighted decision matrix:

Criterion	Description	Weight
Implementation, Risk and Support Capability Criteria 1	Implementation: Demonstrate how your organisation ... (2.4.1)	33.33%
Implementation, Risk and Support Capability Criteria 2	Risk: How does your organisation... (2.4.2)	33.33%
Implementation, Risk and Support Capability Criteria 3	Managed Services and Support: Outline the managed... (2.4.3)	33.33%

Assessment:

Criterion	CloudReach Consulting	EduTech Partners	Digital Synergy
Implementation, Risk and Support Capability Criteria 1	5	5	2
Implementation, Risk and Support Capability Criteria 2	5	5	3
Implementation, Risk and Support Capability Criteria 3	4	4	2
	14/15	14/15	7/15

Scoring Key:

Refer 4.1.2.

4.5 PRICING

Comparison of Initial Costs (financial indicator):

Comparison between Rate Cards for UTS-Nominated salesforce roles (total per day cost):

Role	CloudReach Day Rate (AUD)	EduTech Day Rate (AUD)	Digital Synergy Day Rate (AUD)
TOTAL:	\$44950	\$43850	\$33950
Percentage Discount on Highest Price:	0%	2.47%	24.5%

Government Day Rate (AUD):

Role	CloudReach	EduTech	Digital Synergy
TOTAL:	\$41350	\$40250	\$30650
Percentage Discount on Highest Price:	0%	2.66%	25.9%

Recommended Additional Roles Day Rates:

Role	CloudReach	EduTech	Digital Synergy
TOTAL:	\$21000	\$20900	-
Government Rate:	\$19350	\$19250	-
Percentage Discount on Highest Price:	0%	0.48%	-

Offshore Day Rates:

Role	CloudReach	EduTech	Digital Synergy
TOTAL:	4600	4350	3350
Percentage Discount on Highest Price:	0%	5.44%	27.2%

Average Discount
Cloudreach - 0%
EduTech - 2.76%
Digital Synergy - 25.9%

For pricing breakdown refer to Appendix A.

4.5.1 Critical Evaluation

Cloudreach offers the least affordable pricing scheme unilaterally. EduTech undercuts Cloudreach's pricing strategy, but not by a substantial amount, thus their difference can be considered marginal in the scheme of the project. Digital Synergy provides a significant discount (day rate) compared to their competitors, however, did not price any additional recommended roles, which may speak to their competence and experience in the higher education sector (EA Code of Ethics).

Ultimately EduTech offers the strongest overall value with sector-aligned pricing (sector specific additional roles), strategic role additions, decent volume discounts and effectively considering all pricing criteria.

4.5.2 Decision Matrix

Weighted decision matrix:

Criterion	Description	Weight
Pricing Criteria 1	In the attached Pricing Schedule, provide a rate card ... (2.5.1)	50%
Pricing Criteria 2	In the attached Pricing Schedule, provide a rate card for other Salesforce roles ... (2.5.2)	50%
Pricing Criteria 3	Provide day rates separately for 'offshore' resource options... (2.5.3)	Unweighted

Assessment:

Criterion	CloudReach Consulting	EduTech Partners	Digital Synergy
Pricing Criteria 1	5	5	5
Pricing Criteria 2	4	5	1
Pricing Criteria 3 (optional)	5	5	4
	9/10	10/10	6/10

Scoring Key:

Refer 4.1.2.

4.5.3 Non-price Score summary

Total weighted decision matrix score considering non-price related evaluation criteria:

CloudReach	EduTech	Digital Synergy
82/85	83/85	42/85

4.5.4 Price Score Summary

To consider the impact of discounts, the following was calculated:

	Price criteria score	Average Discount	Discount considered new score (decimal)
CloudReach Consulting	9/10	0%	0.9
EduTech Partners	10/10	2.76%	1.028
Digital Synergy Solutions	6/10	25.9%	0.755

Refer Appendix B for breakdown of calculations.

4.5.5 New Final Scores:

To weight evaluation 50% non-price criteria to 50% price criteria, the following was calculated:

	Non-price score (decimal)	Price score (decimal)	50-50 Weighting (Total Weighted Decision Score)
Cloudreach	0.965	0.9	0.933
EduTech	0.976	1.028	1.002
Digital Synergy	0.494	0.755	0.625

Refer Appendix C for calculations.

Therefore, EduTech receives the highest weight decision score at 100.2%.

5 EVALUATION ASSESSMENT

5.1 OPEN ISSUES WITH TENDERS (QUESTIONS)

5.1.1 Cloudreach Questions

1. Can you detail the support structures you will use to ensure a successful partnership with UTS.
2. Can you justify how your nominated additional roles will positively impact the project.

5.1.2 EduTech Questions

1. Can you further detail your company structure (outside of higher education consultants).

5.1.3 Digital Synergy Questions

1. Can you elaborate more on how your prior experience will translate to the higher education sector.
2. Can you provide specific detail on how the corporate frameworks and structures you used as a small company in contracts with NSW Health and Telstra supported their \$20+ bil revenue scope, or other strategies utilised by your team.
3. Can you explain how you will scale to meet demands from UTS for professional services.
4. Can you detail the capability of your organisation to provide role-specific knowledge transfer, training, and other documentation to UTS.
5. Can you detail how your organisation participates in industry forums and communities of practice (if you do) related to Salesforce and CRM landscapes.
6. Strategy and Governance strategies were omitted from your report, can you detail the frameworks, policies and/or strategies you have in place per UTS's requirements.
7. How your organisation will ensure accessibility (WCAG 2.0 AA), and usability is embedded in outcomes.

5.2 TENDER PROPOSALS RISK ANALYSIS

5.2.1 CloudReach Identified Risks:

1. Lack of Higher Education Specialisation (Compared to EduTech)

- **Probability:** 3 (Possible – They have experience but not to EduTech's depth.)
- **Impact:** 3 (Moderate – May result in more “generic” solutions or missed sector-specific needs, reducing UTS's long-term CRM benefits.)

2. Value justification of additional roles non-specific to higher education sector (compared to EduTech)

- **Probability:** 3 (Possible – UTS may end up paying more for roles with unclear added value.)
- **Impact:** 2 (Minor – Budget pressure and less transparency, but project can still succeed.)

3. Cost Competitiveness

- **Probability:** 5 (Almost Certain – Cloudreach's pricing is higher across-the-board.)
- **Impact:** 3 (Moderate – High costs may deem the project not financially viable.)

	Impact 1 (Negligible)	Impact 2 (Minor)	Impact 3 (Moderate)	Impact 4 (Major)	Impact 5 (Severe)
Prob 5 (Almost Certain)			3.		
Prob 4 (Likely)					
Prob 3 (Possible)			1.		
Prob 2 (Unlikely)		2.			
Prob 1 (Rare)					

5.2.2 EduTech Identified Risks

1. Narrow Sector Focus (Potential Lack of Cross-Industry Innovation)

- **Probability:** 3 (Possible – They highlight specialised university experience but less non-university context.)
- **Impact:** 2 (Minor – Could miss opportunities for creative solutions (innovation) or best-in-class technology from outside higher education.)

2. Issues due to Smaller Scale Compared to Cloudreach

- **Probability:** 2 (Unlikely – EduTech has proven history of successful engagements.)
- **Impact:** 2 (Minor – May affect project timelines during peak demand periods.)

	Impact 1 (Negligible)	Impact 2 (Minor)	Impact 3 (Moderate)	Impact 4 (Major)	Impact 5 (Severe)
Prob 5 (Almost Certain)	Yellow	Yellow	Red	Red	Red
Prob 4 (Likely)	Yellow	Yellow	Yellow	Red	Red
Prob 3 (Possible)	Green	1. Yellow	Yellow	Yellow	Red
Prob 2 (Unlikely)	Green	2. Green	Yellow	Yellow	Yellow
Prob 1 (Rare)	Green	Green	Green	Yellow	Yellow

5.2.3 Risks Associated with Selecting Digital Synergy

1. Lack of Higher Education Sector Experience

- **Probability:** 4 (Likely – Directly acknowledged in their proposal.)
- **Impact:** 4 (Major – May lead to rework, delays, and user resistance.)

2. Unproven Sector-Specific Methodologies

- **Probability:** 4 (Likely – Methodologies are not validated in university settings.)
- **Impact:** 3 (Moderate – May need significant adaptation, which can slow delivery and reduce efficiency.)

3. Insufficient Management and Training Detail

- **Probability:** 3 (Possible – Approach is not tailored for university stakeholders.)
- **Impact:** 3 (Moderate – Poor adoption or knowledge transfer may result, risking project benefits and post-go-live self-sufficiency.)

4. Inadequate Resource Capacity and Scalability

- **Probability:** 3 (Possible – Lean model can become a bottleneck if multiple projects or unexpected demands occur.)
- **Impact:** 3 (Moderate – May lead to delays or reliance on less familiar offshore/contract resources.)

5. Risk of Incomplete Solution Alignment

- **Probability:** 3 (Possible – Sector-specific needs are less well understood.)
- **Impact:** 3 (Moderate – Could result in rework, compliance gaps, or user dissatisfaction.)

6. Stakeholder and Partnership Management Gaps

- **Probability:** 3 (Possible – Ongoing partnership approach is not clearly outlined.)
- **Impact:** 2 (Minor – May affect long-term satisfaction, but project delivery could still succeed.)

7. Over-Reliance on AI

- **Probability:** 4 (Likely – Digital Synergy's methodology prioritizes AI, highlighting the prospect of over-reliance.)
- **Impact:** 2 (Minor – May lead to solutions that lack contextual fit or miss stakeholder needs, requiring manual intervention or rework.)

	Impact 1 (Negligible)	Impact 2 (Minor)	Impact 3 (Moderate)	Impact 4 (Major)	Impact 5 (Severe)
Prob 5 (Almost Certain)					
Prob 4 (Likely)		7.	2.	1.	
Prob 3 (Possible)		6.	3. 4. 5.		
Prob 2 (Unlikely)					
Prob 1 (Rare)					

6 RECOMMENDATION

After a comprehensive analysis of all tender submissions, including weighted decision scores, risk analysis, and critical evaluation against UTS's stated requirements, **EduTech Partners** emerges as the optimal candidate for UTS Salesforce Professional Support services.

Their focus on the higher education sector, substantial track record across leading Australian universities, and significant familiarity with university environments directly align with UTS's vision for CRM transformation. EduTech Partners not only demonstrate strong financial viability and value for money, but also present the strongest approach to risk management, governance, and compliance with the EA Code of Ethics in their tender. Furthermore, EduTech Partners offers a competitive mid-range pricing structure and a proven, education-specific understanding that mitigates delays due to onboarding.

Their proposal exceeds the tender requirements in many aspects and are recommended as the preferred supplier to UTS Salesforce Professional Support services.

7 APPENDIX

7.1 APPENDIX A:

See 'Comparison of pricing PEC A2 attached'.

7.2 APPENDIX B:

Price discount consideration	New Price score
$\frac{9}{10} + (\frac{9}{10} \times 0.000)$	90%
$\frac{10}{10} + (\frac{10}{10} \times 2.76 \times 10^{-2})$	102.8%
$\frac{6}{10} + (\frac{6}{10} \times 2.59 \times 10^{-1})$	75.54%

7.3 APPENDIX C:

	Non-price score (decimal)	Price score (decimal)	Calculation:	50-50 Weighting (Total Weighted Decision Score) (i.e. calculation solution)
Cloudreach	0.965	0.9	$\frac{0.965 + 0.9}{2}$	0.933
EduTech	0.976	1.028	$\frac{0.976 + 1.028}{2}$	1.002
Digital Synergy	0.494	0.755	$\frac{0.494 + 0.755}{2}$	0.625