Lottery intends to update this page from time-to-time to inform prospective vendors of its status and timelines.

If you have any questions about this sourcing project or any other at Lottery, reach out to:

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**Market Engagement**

**Status:** Oregon Lottery has selected Salesforce as its Software Solution! Oregon Lottery is currently drafting the RFP for Services Providers.

**Project Overview**

The Lottery is in the process of modernizing its business applications. A step in this process is for Lottery to move away from 3 legacy, disparate, and feature lacking applications that support its retail business to a modern and integrated system that enables better service.

Lottery is seeking a cloud-based technology solution and a services partner to be a long-term business enabler and assist it through a series of modernization efforts centered around providing an integrated approach to customer relationship management and partner account management to ensure that our retail partners are in important conduit of our customer-obsessed mindset and culture. **In November 2021 Lottery selected Salesforce as its cloud-based technology solution.**

In May 2021, Lottery received funding approval to advance this project, over the next year Lottery intends to engage potential partners and make final selections for both a technology solution as well as a services partner. The entire engagement is expected to incorporate multiple projects over a period of years based on a roadmap developed with the selected services partner and Lottery’s identified business needs. The initial engagement and release of a working software solution is planned for Mid-2022.

Updated November 10, 2021
More about the Retailer Partner Management Sourcing Project:

We asked OSL employees how existing systems affect their work, this is what we heard:

- **HIDSS is written in a dead language.** Anyone who knew how to use it is gone, we have no developers or technical skills inhouse to support it.
- **If OrderPad sincs aren’t timed correctly, the database is corrupted and the workstation becomes unusable and has to be reloaded.** It has to use an exorbitant number of man hours just to get it to work properly.
- **We’re asked to pull meaningful data and develop KPIs, and we want to, but the data doesn’t exist in our current systems.**
- **We get kicked out HIDSS 3-4 times a day, but there is nothing that can be done so we’ve just given up asking.**

Employees are frustrated; hindered by outdated technology that impacts their overall productivity and effectiveness.

Lottery’s Retail Channel is organized into four business units that manage its daily operations:
Current Systems Being Replaced

Lottery currently maintains three separate systems to manage their Retail Support which will be replaced entirely by the RPM-S:

- **HDSS**: Hotline Dispatch Support System, a Lottery computer program used to record, dispatch, and maintain service orders and

- **OrderPad**: Gaming vendor developed CRM software that Field Sales teams use to manage route, inventory, projects, and retailer relationships. This

- **RMS**: Retailer Management System, the CRM Lottery Retail Contracts utilizes to support retailer application processing, contract administration,
miscellaneous information relating to a retailer. Key functionality includes Field Service routes and schedules, problem and solution codes, customer service case management, field service work orders, and preventative maintenance schedules at retailer locations. This software is a Legacy FoxPro application.

table solution includes customer service events and visit motes, misc. retailer merchandising inventory, retailer location and profile information, sales data and information, routes and representative assignments, and field service history. This software was developed by Hudson Alley and is currently managed by IGT.

compliance monitoring and auditing, training records, etc. RMS is the authoritative source for retailer profile and compliance data for the Lottery’s gaming and business systems. This software is a custom developed web application.

**Current State of Retail Support Systems**

Lottery currently manages its retail support using three systems (HDSS, RMS, OrderPad) which rely heavily on workarounds, manual processes, and human ingenuity to effectively manage Lottery’s large portfolio of business. In addition to these issues, HDSS is in a state of disrepair and frequently crashes or becomes corrupted, OrderPad is no longer a supported vendor solution, and RMS is a custom developed web application that does not fully meet the needs of Retail Contracts. Staff noted that there are a lot of manual work-arounds they have to manage, and while each system itself works OK, they don’t work well together, they’re outdated, and they are not able to keep with changing requirements.

Because of Lottery’s current state environment, multiple issues have arisen that severely limit operational efficiency, user experience, and its ability to make data informed decisions. Some of the deficiencies in the current systems are noted below:

| Sales and Service Area data don’t match up | Not able to view contract status (other than active/inactive) | Unable to track retailer persons statuses and inability to follow a key person across locations or organizations | No way to know where a service technician is |
### Service has no dedicated module
- The system doesn’t have a workflow for a reconsideration from a retailer
- There is no tracking of contract changes (e.g. ‘flagging’ modifications)
- The contracting process has no status options

### There is no way to view compliance actions on approved contracts
- The system cannot set up a dispatch, it is handled through email
- Player complaints and interactions are not tracked – there is zero player tracking
- There is no self-service so staff routinely deal with low-level problems

### Systems are not supported with updates
- Reports are not available in one place and for everybody
- Field staff activities are not logged
- Contract renewals, retailer reviews, and sign/ dispenser installations are a very manual process

### Data is available but it is usually a day old and the quality is lacking
- The system has little to no access rules
- Systems are unable to be supported by IT
- Once notes are created there is no ability to edit those (RMS)

### Goals:

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<th>Goal</th>
<th>How Goal may be Achieved:</th>
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| **Promote a data-driven culture** that enables people to make quick, accurate, and optimal decisions across the value chain, improving customer experience and the Lottery’s bottom line. | • Timeline, workload, and similar types of data are available to support process optimization  
• System-wide keyword search to make information easier to find  
• System validates data where possible to ensure good quality data  
• Embedded analytics and reporting  
• Self-service and low-touch point options to reduce costs to support the channel  
• Data Centralization for enhanced granular data to be ingested into the Enterprise Data warehouse |
| **Reduce costs** by providing self-service and low-touch options of support | • System provides self-service options for retailers and players to answer their own questions and initiate/complete workflows independently  
• System provides a retailer portal where information can request, fill, sign, print/save and send-in documentation |
|---|---|
| **Provide increased visibility** through a 360-degree view of customer interactions | • Data is tracked throughout every interaction, including calls, email or text communication, contracting actions, service dispatch, service and sales visits along with the department/staff who had the interaction.  
• Data is shared across the technology with multi-user access at near-real time  
• System allows for flexibility in building reports by allowing for many data points to be reported on  
• In-depth retailer data is available including contractual information, ownership structure, contacts, sales and equipment data, compliance etc.  
• Reports are available in near-real time for data housed in RPM-S or able to be queried from external systems |
| **Improve operational efficiency** by reducing redundancy, leveraging process automation, modernizing processes and providing a more integrated and cohesive working structure | • Technician / Support Service capabilities are enhanced by allowing technicians to open and close calls, enable GPS tracking of technicians, and automate/streamline the dispatch of field service staff to retailer locations  
• Establishment of a knowledgebase that links to frequently used external sites, search rule/statute, and access known solutions to issues to support more effective support  
• Automate workflows using paperless processes, streamline contract renewal and inventory supply orders, and implement auto-notifications via multiple channels (e.g. Email, Text Message)  
• Integrate with Lottery systems and third-party solutions to improve the speed of data lookup and process efficiency (e.g. LaserFiche for application documents, DocuSign, Equifax for credit reporting)  
• Limit the number of 'work-arounds' required to operate the system to Lottery’s requirements |
| **Eliminate risks and reduce technical debt that results from using disparate, legacy solutions to manage the value chain** | • System meets or exceeds security requirements  
• System is actively supported with frequent updates  
• System is highly configurable to meet future Lottery needs  
• Simple configurations (building new forms, workflows etc.) are quick and easy to implement without the need for lengthy or costly engagements |
| --- | --- |
| **Improve user experience for players, retailers, and employees** | • Allow multi-user and multi-module/system access and usage  
• Single Sign On allows access to all systems  
• Allowing access from remote locations using mobile devices |
| **Ensure fairness integrity, security, and honesty across all relationships and interactions** | • System promotes greater ability to manage retailer accounts and activities, system supports unified responses and history/tracking supports better customer experience |

**Changelog:**

September 21st 2021 – Timeline draft updated to reflect the release of Lottery’s RFQ.

September 7th 2021 – Timeline draft updated to reflect a change in approach from a single RFP to an RFQ for software selection to an RFP for services.

October 15th 2021 – Timeline draft updated to reflect a change in status

November 10th 2021 – Timeline updated to reflect change in status and approach. Body updated to reflect that Lottery has chosen Salesforce as its cloud service solution provider.