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# CITY OF PHILADELPHIA

## Office of Innovation and Technology

# REQUEST FOR INFORMATION

# FOR

# CUSTOMER RELATIONSHIP MANAGEMENT (CRM) TOOL

## February 4, 2019

| | |
|---|---|
| Information Session | February 19th, 2019 at 1 PM |
| Deadline for questions, requests for clarification, or requests for additional information | March 1st, 2019 before 5 PM (Local Philadelphia Time) |
| City Responds to Questions | March 8th, 2019 |
| Responses to RFI Due | March 15th, 2019 by 5 PM (Local Philadelphia Time) |

JAMES F. KENNEY, Mayor
Mark Wheeler, CIO, Office of Innovation and Technology

**CUSTOMER RELATIONSHIP MANAGEMENT (CRM) TOOL**

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**CUSTOMER RELATIONSHIP MANAGEMENT (CRM) TOOL**
**NAME OF RFI**
**REQUEST FOR INFORMATION**

## I.    RESPONSE CALENDAR

| | |
|---|---|
| Post Request for Information | February 4th, 2019 |
| Information Session | February 19th, 2019 at 1 PM (Local Philadelphia Time) 1234 Market Street, Suite 1800 Philadelphia, PA  19107 |
| Deadline for questions, requests for clarification, or requests for additional information (email Suzanne.Patton@phila.gov and Gayle.Ruggeri@phila.gov) | March 1st, 2019 before 5 PM (Local Philadelphia Time) |
| City Responds to Questions (http://www.phila.gov/rfp) | March 8th, 2019 |
| Responses to RFI Due (email Suzanne.Patton@phila.gov and Gayle.Ruggeri@phila.gov) | March 15th, 2019 before 5 PM (Local Philadelphia Time) |

## II.    PURPOSE OF REQUEST FOR INFORMATION

The City of Philadelphia (City) is embarking on a significant initiative to upgrade and modernize its administrative business processes and related legacy technology systems that currently support its business operations.  As part of this initiative, the City intends to implement a new enterprise Customer Relationship Management (CRM) Tool, or a package of integrated tools.  The City, through its Office of Innovation and Technology (OIT), has issued this Request for Information (RFI) in order to solicit statements of interest, capabilities, and Rough Order of Magnitude (ROM) cost estimates from all Respondents interested in, and capable of, providing commercial off-the-shelf (COTS) software as part of the City's solution.

Respondents are asked to provide OIT with information regarding their available COTS products and solutions, subject to the following guidelines:

- Identify only COTS products that are modifiable or configurable to meet specific City requirements, and that focus on interoperability, reliability, usability, availability, capacity and scalability

- Present the software solution's interoperability and operational requirements in accordance with the International Organization for Standardization Open Systems Interconnection (OSI) model
- Include an architectural diagram of the solution with a description of the solutions scalability; responses may include one or more models or solutions
- Describe the configurability of the software to meet the specified requirements and services.

Responses should include implementation, integration, and/or configuration services. If, the software can be installed and configured only by the Respondent, that must be clearly stated in the Response, including the reasons why that is the case.

Respondents may, in the City's discretion, be invited to engage in discussions with the City's project team and/or demonstrate their products, services and solutions.

No contract will be awarded pursuant to this RFI. Anyone who does not respond to this RFI is not precluded from responding to any future solicitation issued by the City. The City intends to procure software for this project as soon as reasonably possible, in accordance with the City's procurement laws and practices for software purchases, which may include, but are not limited to, the use of existing City contracts or certified cooperative purchase agreements. Respondents will not be bound by the ROM cost estimates provided in their responses to this RFI in a future procurement. The City also reserves the right to not procure any software.

## III. RFI CONTACT INFORMATION FOR QUESTIONS, REQUESTS FOR CLARIFICATION

All questions (see RFI Question Template Exhibit) and requests for clarification concerning this RFI must be in writing and submitted via email no later than 5:00 pm, Local Philadelphia Time, on March 1, 2019 to:

Suzanne Patton, IT Project Manager      Gayle Ruggeri
Office of Innovation and Technology      Office of Innovation and Technology
Suzanne.Patton@phila.gov                      Gayle.Ruggeri@phila.gov

Responses to questions and requests for additional information shall be at the sole discretion of the City. Any additional information and/or responses to questions will be posted only on the City's website at http://www.phila.gov/rfp ("Additional Opportunities"). No additional information and/or responses to questions will be sent by email. Nothing in this RFI shall create an obligation on the City to respond to a Respondent submitting a response.

The City may, in its sole discretion, issue addenda to this RFI containing responses to questions, clarifications of the RFI, revisions to the RFI or any other matters that the City deems appropriate. Addenda, if any, will be posted on the City's website at http://www.phila.gov/rfp ("Additional

Opportunities"). It is the Respondent's responsibility to monitor the Additional Opportunities site for Addenda and to comply with any new information.

Oral responses made by any City employee or agent of the City in response to questions or requests for information or clarification related to this RFI are not binding and shall not in any way be considered as a commitment by the City.

If a Respondent finds any inconsistency or ambiguity in the RFI or an addendum to the RFI issued by the City, the Respondent is requested to notify the City in writing by the above deadline for questions and requests for information or clarification.

## IV.   ABOUT THE CITY OF PHILADEPHIA AND OIT

The City of Philadelphia is the largest city in the Commonwealth of Pennsylvania and the fifth-most populous city in the United States with over 1.5 million residents.  Additionally, due to its rich historic and cultural heritage, the region is visited by more than 40 million people each year.

Philadelphia is located in the southeastern section of Pennsylvania and the coterminous city/county covers 143 square miles. The City is bordered by the following counties: Bucks, Montgomery and Delaware in Pennsylvania, and Burlington, Camden and Gloucester in New Jersey.

As an operating department of the City, OIT provides technology and telecommunication services to the City, its employees, and the community.  There are over 25,000 city employees in Philadelphia.

## V.   INFORMATION SESSION

An Informational Session to review the requirements of this RFI will be held in Philadelphia, Pennsylvania at the time and location indicated below.

| **Date** | **Location** |
|---|---|
| February 19th, 2019, 1 PM (Local Philadelphia Time) | 1234 Market St, Suite 1800 Philadelphia, PA  19107 |

Attendance at the Information Session is optional but recommended.
There will be a conference call dial-in number for the Information Meeting

To receive the dial-in information:
- email Suzanne Patton, suzanne.patton@phila.gov, by 05:00 PM on February 15th, 2019 Local Philadelphia Time
- include the name and email address of who is to receive the dial in information.

## VI. ANTICIPATED SOLUTION REQUIREMENTS

The proposed solution should include the following functionality:

- All standard/core Customer Relationship Management functionality
- A Robust Knowledge Base
- Field Service functionality (e.g., service orders, job status, tracking of vehicle locations)
- Built in and customizable workflows
- Ability to integrate with the City's existing Systems (see Appendix A)
- A customer portal to request City Services
- Self service capabilities
- Multiple communication channels for constituent communications (text, email, etc.)
- Constituent information collected should include at a minimum:
    - Contact Information (Name, Address, Phone Number(s), email address(es)
- The ability to use built-in privacy-by-design and privacy-by-default methodologies to comply with (including but not limited to) the General Data Protection Regulation (GDPR), Health Insurance Portability and Accountability Act (HIPAA), Criminal Justice Information Services Security Policy (CJIS), Federal Information Security Management Act of 2002 (FISMA), Payment Card Industry (PCI) Data Security Standard (DSS), and U.S. IRS requirements.
- Tracking of constituent demographic information
- Ability to provide a comprehensive overview of service tasks, workloads, and employee skills to effectively assign resources and accelerate case resolution
- Support file attachments in standard file types (e.g., DOCX, XLSX, PPT..PDF, GIF, JPG, .WAV .AVI, ZIP, etc. up to 50 MB
- The ability to create and update segmented lists, recruit subscribers, customize emails by subscription category, and embed multimedia information
- Ability to search on all data using a variety of criteria and to extract data in the standard file formats
- Provide Limited English Proficiency (LEP) individuals with meaningful access to the system (See Appendix B for the languages the City supports)
- Change Management that includes the review and approval of proposed changes using a change approval workflow
- Audit logs on all data
- Built-in and Custom Dashboards, Reporting, and Analytics
- E-commerce capability
- Website is mobile friendly/responsive

Please note that CRM for government is often significantly more complex than CRM for the private sector as:
- citizens may be both part a part of the government
- engagement is on a transactional basis
- the focus is on compliance

- there may be multiple silos across departments
- there are multiple regulations, standards, and policies governing security, collection/use of data, and procurement of systems

See Appendix C for Sample Use Cases

The overarching goal of this initiative is to improve the current AAA system process by enhancing the workflow process, eliminating data entry redundancy, providing integration with external agency systems, and adhering to best-practices while continuing to meet applicable federal regulatory requirements such as CJIS and HIPAA compliance.

The City is also looking to improve daily operations, which means more streamlined and improved quality of services for our customers.

## VII.  SUBMISSION GUIDELINES

The City expects each Respondent to include in their response to this RFI the following items in the order listed:

**Company Overview:**
Include company name, physical address, phone number, fax number, and web address, a brief description of the company, its services, business size (total revenue and number of employees), and point(s) of contact, including name, address, phone and email address.  Note the company's operations including the number of years the company has been supporting this solution; location of company's headquarters and all other office locations; and three years of financial data to ensure company stability.

If applicable, please describe any subcontractors or partners with witch you have worked. Resumes need not be included.

**Experience:**
Describe your company/organization's relevant experience (and that of partners, when applicable) with XYZ Solutions.  Identify your experience with clients of similar size and scope to the City of Philadelphia, including client name, engagement title, description of engagement, the solution implemented, and the methodology used, cost, the start and completion dates of the project, as well as, the name, address and telephone number of a contact person.

**Product/Software Solution:**
Identify one or more COTS solutions that meet the City's requirements. Responses that describe solutions which are completely custom software may, in the City's discretion, be rejected without review.

A major goal of this RFI is to provide Respondent with an opportunity to inform the City and OIT about their respective software solution's interoperability and operational requirements in reference to the OSI model. Respondents are encouraged to include in their response an

architectural diagram of the solution with description of the solution's scalability. Respondents are welcome to provide one or more models or solution sets to meet this requirement for an integrated interoperable solution set.

**Infrastructure/Architecture Model:**
Identify the infrastructure/architecture model(s) you provide and support, and whether they are on-premise, hosted off-premise, or Software-as-a-Service (SaaS) models.

Supplement this request with an interoperable architectural diagram outlining each OSI layer requirement for enablement, sustainment, reliability, redundancy, and growth. Highlight your anticipated annual upgrade and patch release schedule.

**Key Features:**
Identify best of breed features included in the proposed COTS solution(s), including, at a minimum, the Key Features in Section VI. Anticipated Project Requirements.

**Support and Maintenance Model:**
Provide the anticipated ongoing software maintenance and support services required to sustain the solution including frequency of upgrades and patches/bug releases and the estimated timeframes to complete. Outline the services in your support model including available service level agreements.

**Training Model:**
Outline the services in your training model for administrative and end user training including the training services, methodology, and typical schedule. Include the pricing model for training services and the methodology and schedule.

**Reporting and Key Performance Indicators (KPIs):**
Provide the standard and custom reporting included in your solution and the available KPIs. Include information on data input and export capabilities; security and auditing, and dashboards and metrics.

**Pricing/Licensing Model:**
Include a general pricing model and costs for the software based upon the information provided in this RFI. This pricing should also indicate the licensing model, (i.e. licensing by individual users, by core, by seat etc.), descriptions of the hosting models available, and estimates of associated costs. Include cost estimates for ongoing support and maintenance for three years, and when those support and maintenance costs begin (i.e. at time of purchase, after implementation, etc.). If applicable, include a list of additional items or services/software needed to operate the system that are not included and must be provided/purchased by the City.

**Responses to vendor questions – these are things you can get answers to in the presentations**

Respondents will not be bound by any cost estimates included in responses to this RFI.

## VIII. USE OF RESPONSES

Responses to this RFI may be used by OIT to select a software product for a Customer Relationship Management Tool.  Responses may also be used to assist OIT in gathering information for planning purposes, and for purposes of identifying sufficient resources for an implementation initiative.

The City does not intend to announce any further actions taken pursuant to this RFI.  If any such announcements are made, at the sole discretion of the City, those announcements will be posted with the original RFI.  In some cases, at the City's sole discretion, the City may issue an RFP.  The City will notify Respondents to this RFI once the RFP has been posted on the City's website.

The City will notify you if additional information is required in order to evaluate your response to this RFI. Absent such follow up from the City, we respectfully request that respondents refrain from requesting additional information on the status of this RFI.  In order to protect the integrity of the City procurement process, City personnel will not respond to requests for additional information on the status or outcome of this RFI, other than as described above.

## IX.  HOW TO SUBMIT RESPONSES

Respondents should submit their responses electronically (hard copies are unacceptable) in MS Word or Adobe PDF format, as a single document (see note below), to:

| | |
|---|---|
| Name | Gayle Ruggeri@phila.gov |
| Department | Office of Innovation and Technology |
| email | [Gayle.Ruggeri@phila.gov](mailto:Gayle.Ruggeri@phila.gov) |

**Responses are due March 15th, 2019 before 5:00 pm, Local Philadelphia Time.**

Note:  Response document(s) are limited to 30 MB; if necessary, please submit multiple files or zip/compress the file(s)

## X.  CONFIDENTIALITY AND PUBLIC DISCLOSURE

Respondents shall treat all information obtained from the City which is not generally available to the public as confidential and/or proprietary to the City.  Respondents shall exercise all reasonable precautions to prevent any information derived from such sources from being disclosed to any other person. No other party, including any Respondent, is intended to be granted any rights hereunder.

## XI.  RIGHTS AND OPTIONS RESERVED

In addition to the rights reserved elsewhere in this RFI, the City reserves and may, in its sole discretion, exercise any or more of the following rights and options with respect to this RFI if the City determines that doing so is in the best interest of the City:

1.  Decline to consider any response to this RFI ("response"); cancel the RFI at any time; elect to proceed or not to proceed with discussions or presentations regarding its subject matter with any Respondent and with firms that do not respond to the RFI; to reissue the RFI or to issue a new RFI (with the same, similar or different terms);

2.  Select a COTS package from a vendor that does not respond to this RFI, or elect not to proceed with any procurement;

3.  Waive, for any response, any defect, deficiency or failure to comply with the RFI if, in the City's sole judgment, such defect is not material to the response;

4.  Extend the Submission Date/Time and/or to supplement, amend, substitute or otherwise modify the RFI at any time prior to the Submission Date/Time, by posting notice thereof on the City web page(s) where the RFI is posted;

5.  Require, permit or reject amendments (including, without limitation, submitting information omitted), modifications, clarifying information, and/or corrections to responses by some or all Respondents at any time before or after the Submission Date/Time;

6.  Require, request or permit, in discussion with any Respondent, any information relating to the subject matter of this RFI that the City deems appropriate, whether it was described in the response to this RFI;

7.  Discontinue, at any time determined by the City, discussions with any Respondent or all Respondents regarding the subject matter of this RFI, and/or initiate discussions with any other Respondent or with vendors that did not respond to the RFI;

8.  To conduct such investigations with respect to the financial, technical, and other qualifications of the Respondent as the City, in its sole discretion, deems necessary or appropriate;

9. Do any of the foregoing without notice to Respondents or others, except such notice as the City, in its sole discretion, may elect to post on the City web page(s) where this RFI is posted.

This RFI and the process described are proprietary to the City and are for exclusive benefit of the City. Upon submission, responses to this RFI shall become the property of the City, which shall have unrestricted use thereof.

## XII.  PUBLIC DISCLOSURE

By submitting a response to this RFI, Respondent acknowledges and agrees i) that the City is a "local agency" under and subject to the Pennsylvania Right-to-Know Law (the "Act"), 65 P.S. §§ 67.101-67.3104, as the Act may be amended from time to time; and ii) responses may be subject to public disclosure under the Act. In the event the City receives a request under the Act for information that a Respondent has marked as confidential, the City will use reasonable efforts to consult with Respondent regarding the response and, to the extent reasonably practicable, will give Respondent the opportunity to identify information that Respondent believes to be confidential proprietary information, a trade secret, or otherwise exempt from access under Section 708 of the Act.

Notwithstanding anything to the contrary contained in this RFI, nothing in this RFI shall supersede, modify, or diminish in any respect whatsoever any of the City's rights, obligations, and defenses under the Act, nor will the City be held liable for any disclosure of records, including information that the City determines in its sole discretion is a public record and/or information required to be disclosed under the Act.

RFI Question Template Exhibit

| Question Number | RFI Section # *(If applicable)* | Respondent Name: |
|---|---|---|
| | | Question(s) |
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |
| 6. | | |
| 7. | | |
| 8. | | |
| 9. | | |
| 10. | | |
| 11. | | |
| 12. | | |

## Appendix A – Applications Integrations

The tool should be able to integrate with or import/export data from the following applications (at a minimum) using APIs (list not exhaustive):

- 311 Systems
- ArcGIS Online REST API
- Call Center Systems
- Courts' Systems
- Employment Systems
- ESRI's ArcGIS Server feature services
- Financial Systems
- Health Systems
- Housing Systems
- Human Resource Systems
- L&I Systems
- Multiple Revenue Systems
- Office 365 Suite
- PHL Contracts
- Prisons' System
- Procurement Systems
- Public Safety Systems
- Records Systems
- Recreation's Systems
- Help Desk and Work Order Systems: SysAid, Permofo, Cityworks, Maximo
- Utilities' Systems

# Appendix B Language Translation

The City currently supports the translation of 103 different languages and requires the CRM to be able to support translations in the following languages:

| | | | |
|---|---|---|---|
| Afrikaans | French | Kyrgyz | Serbian |
| Albanian | Frisian | Lao | Sesotho |
| Amharic | Galician | Latin | Shona |
| Arabic | Georgian | Latvian | Sindhi |
| Armenian | German | Lithuanian | Sinhala |
| Azerbaijani | Greek | Luxembourgish | Slovak |
| Basque | Gujarati | Macedonian | Slovenian |
| Belarusian | Haitian Creole | Malagasy | Somali |
| Bengali | Hausa | Malay | Spanish |
| Bosnian | Hawaiian | Malayalam | Sundanese |
| Bulgarian | Hebrew | Maltese | Swahili |
| Catalan | Hindi | Maori | Swedish |
| Cebuano | Hmong | Marathi | Tajik |
| Chichewa | Hungarian | Mongolian | Tamil |
| Chinese (Simplified) | Icelandic | Myanmar (Burmese) | Telugu |
| Chinese (Traditional) | Igbo | Nepali | Thai |
| | Indonesian | Norwegian | Turkish |
| Corsican | Irish | Pashto | Ukrainian |
| Croatian | Italian | Persian | Urdu |
| Czech | Japanese | Polish | Uzbek |
| Danish | Javanese | Portuguese | Vietnamese |
| Dutch | Kannada | Punjabi | Welsh |
| Esperanto | Kazakh | Romanian | Xhosa |
| Estonian | Khmer | Russian | Yiddish |
| Filipino | Korean | Samoan | Yoruba |
| Finnish | Kurdish (Kurmanji) | Scots Gaelic | Zul |

# Appendix C – Sample Use Cases

The CRM system will be administered by the Office of Innovation and Technology and used across the City, to include the Executive Management, as well as other departments across the City.

Sample Use Cases are listed below.

| Help Desk or Work Order Operations | Business License, Grant or Permit Approval Path | Case Management |
|---|---|---|
| • Record, categorize, and track inqueries and responses<br>• Preferably to have one citizen "front door" and for various departments to have the ability to coordinate services behind the scenes through the CRM<br>• Integrates with email, web, social media and mobile clients<br>• Configurable approval path depending on nature of operation<br>• Applicable to wide range of operations: taxes, human services, education, IT, etc.<br>• Reports / querries / metrics | • Integrates with separate licensing, taxation and health sytem RDBMS<br>• Configurable approval path depending on license type<br>• Manages interactions back and forth between staff and systems for tax accounts, health inspections, commerce grants, zoning permits, etc.<br>• Maintains transparency of process for City and customers<br>• Reports / querries / metrics | • Applicable to wide range and scales of use: human resources, zoning appeals, law cases, health and medical, recruitment, event managemnet, etc.<br>• Maintains appropriate privacy and security standards including HIPPA, CJIS, IRS<br>• Configurable access to all or portions of data depending on security level<br>• Reports / querries / metrics |

# Customer Relationship Management Tool (CRM)

## RFI Information Session

Project Sponsor: Mark Wheeler, CIO, Office of Innovation & Technology

Project Manager: Suzanne Patton, PMP, Office of Innovation and Technology

February 19th, 2019  |  1234 Market St., Philadelphia PA  19107

**Office of Innovation & Technology**

# Guidelines

- This is a formal process
- Please sign-in; the sign-in sheet is our record of attendance at the meeting
- The RFI is the official source of information including the posted responses to submitted questions
  - Information provided today is **not** binding
- Any changes/updates to the RFI will be posted on http://www.phila.gov/contracts; click 'Additional Opportunities'

Office of
**Innovation & Technology**

# Full Details for the RFI

- [http://www.phila.gov/contracts](http://www.phila.gov/contracts); click "additional opportunities

**Request for Information for an Enterprise Customer Relationship Management Tool**
*Posted Feb 04, 2019*

The City of Philadelphia (City) is embarking on a significant initiative to upgrade and modernize its administrative business processes and related legacy technology systems that currently

[+]

**Click the "+" to display full text and files**

- This Presentation, Question Form Template and responses to the questions posed will appear below the project description. See example below:

■ Request for Information

■ Appendix - NRC Feedback

■ Deadline Extension Addendum

■ RFI- Questions and Answers

[-]

**Links to presentation and Q&A will be posted here following meeting**

Office of
**Innovation & Technology**

# Guidelines *Continued...*

- Submissions should clearly explain how the solution will address the requirements detailed in this RFI and follow the submission guidelines in Section VII.

- City staff participating in this RFI process are under a Confidentiality and Conflict of Interest agreement which means no vendor interactions outside of the formal process.

- All questions submitted and any responses provided will be shared with all attendees (any questions posed today should also be submitted in writing).

Office of
**Innovation & Technology**

# Submission Instructions

- Respondents should submit their responses electronically in MS Word or Adobe PDF Format, as a single document, to the City's contacts:

| | |
|---|---|
| Suzanne Patton, PMP Project Manager | Gayle Ruggeri, PMP |
| Office of Innovation & Technology | Office of Innovation & Technology |
| Suzanne.Patton@phila.gov | Gayle.Ruggeri@phila.gov |

- RFI Responses are due March 15th, 2019 before 5:00 PM Local Philadelphia Time

Office of
Innovation & Technology

# Response Calendar

- RFI Posted **2/4/19**

- Information Session **2/19/2011 at 1:00 PM**

- Deadline for Questions **3/1/2019 before 5:00 PM**

- City Responds to Questions **3/8/2019**

- Responses to RFI Due **3/15/2019 before 5:00 PM**

Office of
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# Scope

- The City of Philadelphia intends to implement a new Enterprise Customer Relationship Management (CRM) Tool, or a package of integrated tools.

- The City is looking for Commercial Off The Shelf (COTS) product(s) that are modifiable or configurable to meet specific City requirements, and that focus on interoperability, reliability, usability, availability, capacity, and scalability.

- The City is looking for a CRM solution to accommodate multiple, disparate City departments, users, and systems that will utilize the CRM Tool.

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# Requirements

The proposed solution should include (but is not limited to) the following functionality:

- All standard/core Customer Relationship Management functionality

- Ability to integrate with the City's existing Systems (see Appendix A)

- The ability to create and update segmented lists, recruit subscribers, customize emails by subscription category, and embed multimedia information

# Requirements Continued...

- Ability to provide a comprehensive overview of service tasks, workloads, and employee skills to effectively assign resources and accelerate case resolution
- Provide Limited English Proficiency (LEP) individuals with meaningful access to the system (See Appendix B for the languages the City supports)
- Change Management that includes the review and approval of proposed changes using a change approval workflow
- Un-editable audit logs on all data
- Built-in and Custom Dashboards, Reporting, and Analytics
- E-commerce capability
- Website is mobile friendly/responsive

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# Requirements Continued…

- The ability to use and comply with built-in privacy-by-design and privacy-by-default methodologies including but not limited to:
  - General Data Protection Regulation (GDPR)
  - Health Insurance Portability and Accountability Act (HIPAA)
  - Criminal Justice Information Services Security Policy (CJIS)
  - Federal Information Security Management Act of 2002 (FISMA)
  - Payment Card Industry (PCI) Data Security Standard (DSS)
  - U.S. IRS requirements

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# Submission Guidelines

- Follow the Submission Guidelines carefully

- Your response should tell the story of what your product does, how it supports your customers, and how it can addresses our requirements and use cases

- Describe your company's capabilities for:

  - Configuration and if needed, Implementation

  - Support and Maintenance

  - Training

# Submission Guidelines

*Continued…*

- Include detailed pricing model.  Respondents will **not** be bound by cost estimate in their RFI responses.
  - If multiple products are detailed, please break down pricing separately.
  - If software and hardware are included in the solution
    - pricing should include licensing model (e.g., by individual user, by core, by seat).
    - Describe hosting models available and estimates of associated costs.

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# Questions?

| # | RFI Section # (If applicable) | Question | Response |
|---|---|---|---|
| 1. | | Is the Knowledge Base for internal or external use? | Both |
| 2. | | Would you be emailing the KB articles? | City staff should be able to email Knowledge Base articles to assist in responding to inquiries and citizens should be able to email/download Knowledge Base articles. |
| 3. | | Do you need GPS tracking of vehicles from a provider such as https://www.geotab.com? | GPS tracking of vehicles is desired. Respondents should indicate the GPS providers they currently interface with and those capable of interfacing with their solution. |
| 4. | | What type of devices are used in the field? | Various brands and models of laptops, mobile devices and notebooks could be utilized in the field. |
| 5. | | Would SMS text be required for constituent communications? | Yes |
| 6. | | Do you currently have SharePoint? Online or On-premises? | Yes. Both SharePoint Online and On-Premises |
| 7. | | Do you need the ability to send bulk email? If so, do you need reporting of emails such as bounced, unsubscribed, opened, clicked, etc? | Yes. Reporting on all email events is desired. |
| 8. | | For E-commerce, what type of transactions are being performed? | Various types of E-commerce transactions may potentially be performed including but not limited to:<br><br>E-commerce transactions include:<br>1. Community Information<br>2. Community Events<br>3. Community Services<br>4. Business Services<br>5. Leisure and Recreation<br>6. City Purchasing |
| 7. | | How many users are expected? | Number of users will be determined during subsequent discovery phases. Respondents should indicate any limitations on user capacity. |
| 8. | | Is there existing data that would need migrated? | This will be determined during discovery. Some departments may need to migrate data. |
| 9. | | Do you prefer SaaS? | Yes, but SaaS is not always possible. Please submit solution(s) that best meet our requirements. The City prefers a solution that is configurable vs. a custom-built solution. |
| 10. | | Does the City currently have an enterprise wide CRM solution in place? If so, was it provided by a vendor? | No. |

| # | RFI Section # (If applicable) | Question | Response |
|---|---|---|---|
| 11. | | I recall the City procured a 311 CRM system a few years ago, which is provided by Unisys. Is this system still in place? Will the new system be replacing this, or integrating with it? | 311's CRM is still in being used and would not be replaced.  However, the proposed solution needs to interface with the 311 CRM. |
| 12. | Appendix A | For the existing applications that the new system may integrate with, could you provide details on these systems (are they vendor provided? Are they on specific software/platforms? Are they all in place, or part of ongoing procurements?) | Please see the list in Appendix A.  Specific details will be provided during any potential implementation process. The applications are in place on various platforms.  The proposed solution needs to be flexible enough to interface with all or most of our existing applications listed in Appendix A. |
| 13. | | Is this considered to be an urgent need for the City? If there is to be an RFP later, does OIT have an anticipated solicitation release date, or a project start, or implementation estimate? | This RFI has been issued to gather information and may or may not result in an RFP. |
| 14. | | Has funding been secured for this project? | The RFI is to gather information only. |
| 15. | | What is the overall budget for this replacement initiative? | See Question 14 above. |
| 16. | | What is the City paying annually for your current CRM solution? | The City does not have an Enterprise CRM solution. |
| 17. | | Is there a preference between an on-premise City hosted solution or a vendor cloud hosted solution? | See question 9 above. |
| 18. | | What are the main issues and/or limitations of the City's current CRM solution that you are looking to solve? | The City does not have an Enterprise CRM solution. |
| 19. | | What is the City's buying process?  Can the City select from the RFI or will you also issue an RFP? | Please review Section VIII (Use of Responses), paragraph 2. |
| 20. | | What is the decision timeline for this RFI (and any future RFP process if required)? | This is to be determined |
| 21. | | When will the City want to have a vendor selected? | This is to be determined |
| 22. | | When would the City want to start an implementation? | Please refer to the last paragraph of Section II - PURPOSE OF REQUEST FOR INFORMATION. |
| 23. | | When would the City want to be live on a new solution? | Please refer to the last paragraph of Section II - PURPOSE OF REQUEST FOR INFORMATION. |

| # | RFI Section # (If applicable) | Question | Response |
|---|---|---|---|
| 24. | | Will the City consider RFI responses that suggests a course of action for the city to conduct an application rationalization assessment or study? | Yes, the City would consider responses with that course of action. Please cost separately in your pricing/licensing model. |
| 25. | | Are there any other shared platform or application services that the City departments share? | There is a possibility additional platforms or applications would be found during any potential discovery. |
| 26. | | What is the City policy regarding hybrid SaaS and On-premise solutions? | Respondents should propose the solution that best meets the City's requirements. |
| 27. | | Can the City provide its current security requirements? | Refer to Section VI of the RFI. |
| 28. | VI | Is the City utilizing any other enterprise reporting tools for dashboarding? | Currently the City does not have an enterprise reporting tool for dashboards. |
| 29. | Appendix A | Does the CJIS requirements need to be part of the core CRM platform? Can the CJIS requirement be met by integrating through other web services which provide additional security? | This will be determined during any potential discovery phase with the Public Safety departments. |
| 30. | | How will the City determine the number of User of the System? | See Question 7 |
| 31. | | Can you provide examples of the required ecommerce capabilities? What City department(s) will require this functionality? | For examples of E-Commerce capabilities, please see response to question #8.<br><br>All City departments may require this capability. |
| 32. | | Does the public facing portal have to be ADA compliant and if so, at what level? | This is highly desired but not required. |
| 33. | | Does the City Office of Information Technology have a middleware standard for supporting integration to 3rd Party Applications? | The middleware must support open standard integration protocols such as RESTful JSON to provide seamless integrations with 3rd Party applications. |
| 34. | Appendix B | How does the City support the diverse lists of languages provided in Appendix B for public facing websites? What is the policy? | The City uses Google Translate for language diversity. |
| 35. | Appendix A | What version of ArcGiS? | We normally support N-2 or higher but currently, 10.4.1 – 10.6.1 |
| 36. | | What is the integration prioritization for the CRM? | This is to be determined. |
| 37. | | What would the City consider to be their most critical business applications that will adopt the new CRM? | This is to be determined. |

| # | RFI Section # (If applicable) | Question | Response |
|---|---|---|---|
| 38. | | What type of project methodologies (Agile/Waterfall) that the City see as the best fit for implementing an enterprise platform? | Both, some potential implementations will be best suited for Agile, while others may require Waterfall. |
| 39. | | Have the City participated in any User Experience or Journey Mapping workshops to determine internal and external user personas? | No, we are at the beginning of the process. |
| 40. | | Does the City currently have an enterprise wide document management/repository application? If so, what is it? | SharePoint and OneDrive |
| 41. | | How does the City currently manage the current knowledge base? How many current knowledge articles? What is the policies for publishing your current knowledge base? | The City does not have an enterprise knowledge base. |
| 42. | | Can the City provide a list of data sources and records counts for data migration? | Not at this time. |
| 43. | | How important is for the CRM platform to have integrated reporting and dashboards capabilities? | Both are required. |
| 44. | | What would the City consider the ideal partner relationships for implementing this enterprise CRM? | This RFI is only to gather information regarding product functionality and other characteristics of a CRM. |
| 45. | | Can you provide lessons learned from other enterprise projects? | Not applicable to this RFI. |
| 46. | | Can you provide details of the upcoming RFI steps and timeline (e.g. RFI, RFP, Selection, Start, etc.)? | To be determined. |
| 47. | | Can you provide any insight into the City's evaluation and selection criteria for both the technology vendor and implementation partner? | To be determined. |
| 48. | | Is the CRM RFI targeted towards CRM vendors, implementation partners, or both? | The RFI is targeted towards an Enterprise CRM tool not implementation services. |
| 49. | | Will the City allow a joint CRM vendor and system implementation partner RFI submission? | We are looking for information regarding an Enterprise CRM Tool(s).  Implementation services are not being requested, but vendors may provide this information at their discretion. |
| 50. | | Is there an established rate card for the implementation portion of the project? If so, can it be shared to support cost calculations? | No. |

| # | RFI Section # (If applicable) | Question | Response |
|---|---|---|---|
| 51. | Section VI and Appendix B | In regards to the languages that need to be supported, can you clarify what languages are required for translation for Internal (City of Philadelphia Employees) users and what languages are required for External portal users? | At a minimum, those languages listed in Appendix B. |
| 52. | General Question not tied | During this initial implantation phase, does the City of Philadelphia have a prioritized list of departments to implement the new CRM solution? Please provide this list. | This is to be determined. |
| 53. | General Question not tied to any section in RFI | What solution (if any) does the City of Philadelphia use for document management/storage and approx. how much data is stored? If one or more solutions are used, which departments use the document management solution? | The City utilizes various document management tools. Detailed information will be provided during any potential discovery. |
| 54. | N/A | Can the City clarify the response due date? There are two different dates listed in the RFI. | The responses are due March 15th. |
| 55. | N/A | What are the anticipated number of City internal users that will require access to the solution? What are the anticipated number of external users that will require access to the solution? Will these users require authenticated access to the solution? | See Question #7 |
| 56. | Section VI. Anticipated Solution Requirements | Can the City provide more details around its need for an e-commerce solution? Please provide specific use cases. | Please see the response to question #8. |
| 57. | | Roughly how many internal users will utilize the new CRM system? | See Question #7 |
| 58. | | Roughly how many field resources do you have? | That information cannot be determined at this time. |
| 59. | | Roughly how many internal Contact/Customer records do you believe you will be managing? | That information cannot be determined at this time. |
| 60. | | Do you have any rough numbers of the number of outreach emails you plan to send? (They might not have any idea about this one) | That information cannot be determined at this time. |
| 61. | | Please Describe the requirements gathering from the 55 departments OIT has performed to date. | Requirements gathering has not been undertaken. |

| # | RFI Section # (If applicable) | Question | Response |
|---|---|---|---|
| 62. | | Assuming a phased roll out. Of the 55 Departments, please identify the individual department to the following. Early Adopter (Phase 1), Early Majority (Phase 2), Late Majority (Phase 3), Laggard (Phase 4). Please describe the criteria used. | This information has not been determined yet. Also, please see the response to question #61. |
| 63. | | We learned from the information meeting that the vision is to have a 360 view of citizens accessible to all departments. As a result, the intent is to improve citizen engagement i.e. the insurance agency example. Please describe the other tools/solutions/processes that OIT has identified to improve citizen engagement. | Each department will have their own specific requirements and uses for the CRM that will be determined during any potential discovery process. |
| 64. | | Please describe the business process transformation that OIT expects. How is this intended to be managed? | Business process transformation is not related to this RFI which seeks information regarding an Enterprise CRM Tool(s). |
| 65. | Section VII. Submission Guidelines. Responses to vendor questions – these are things you can get answers to in the presentations | Under the header "Responses to vendor questions – these are things you can get answers to in the presentations" is there intended to be a response/content provided by the bidder? Additionally, could you provide additional information on the presentation referenced here? | No content is required by the respondent for this subsection. The notice is referring to the Information Session Presentation that can be found on eContracts under the [+]. |
| 66. | VI | What's city's plan for master data management? | That is be determined. |
| 67. | VI | You mention the ability to support file attachments of various types. Is this requirement simply to archive these files, or do you require a facility to view / edit these files within the solution? | This is to be determined by the individual departments and how they wish to utilize the tool once we are in any potential implementation phase. |
| 68. | VI | You mention the ability to maintain audit logs on all data. What level of detail do you require? Is this requirement field or Object / Table level? | There should be a noneditable audit log of all changes to any data or tool configuration changes. |
| 69. | Appendix A | In consideration of all systems that are part of the integration, how many distinct endpoints are there? Do you have endpoints that service multiple systems? | The number of endpoints has not been determined. Yes, there are some endpoints that service multiple systems. |

| # | RFI Section # (If applicable) | Question | Response |
|---|---|---|---|
| 70. | Appendix A | How many of the integration endpoints are bi-directional? How many are callouts from the CRM system? How many are pushing data into CRM? | None of this information has been determined at this time. |
| 71. | Appendix A | Do you have any commercial middleware in place? Any inconsideration if not? | This has not been determined. Any one or more of the 55 departments could have middleware in place. |
| 72. | Appendix A | For the integrations, what protocol do you require / prefer? SOAP? REST? | REST with JSON responses. |
| 73. | Appendix A | Can you give us some perspective on volume of data that would need to be stored in the CRM? | That is to be determines during any potential discovery process with the various departments. |
| 74. | Appendix A | Can you give us perspective on the volume of data that would be involved in the integration processes? | That is to be determines during any potential discovery process with the various departments. |
| 75. | Appendix A | Can you give us perspective on which integrations would be real time and associated volume of record(s) per call? | That is to be determines during any potential discovery process with the various departments. |
| 76. | Appendix A | Can you give us perspective on which integrations would be batch at a specified frequency? | That is to be determines during any potential discovery process with the various departments. |
| 77. | VI | Field Service - Does the City currently manage the scheduling of it field workers? Is this a requirement? | Certain departments do handle field service scheduling. Yes, this is a requirement. |
| 78. | VI | Field service - Is mobile field service capability required for the field workers? | Yes, this is a requirement. |
| 79. | VI | Field service - What are the mobile devices / platform currently being used by field workforce? | Android and some iPhone devices. |
| 80. | | Integration with existing systems - Does the City have a Enterprise Service Bus which connects all it existing systems? | Please see the response to question #33. |
| 81. | VI | Integration - Will the City provide the integration tech. information for the existing systems? | This information will be provided during any potential discovery process. |
| 82. | VI | Privacy requirements - Is there a document stating the specific privacy requirements for the CRM tool? | This information will be provided during any potential discovery process as each department may have different privacy limitations required. |
| 83. | VI | Demographic info - What is the specific tracking requirements? | This would need to be determined during any potential discovery process. |
| 84. | VI | E-commerce - Is there an existing ecommerce platform that needs to be integrated with CRM? | Yes, there is currently ePay, however, there may be additional methods used in various departments. |
| 85. | | | |