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
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’
Full Details for the RFI

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

<table>
<thead>
<tr>
<th>Request for Information for an Enterprise Customer Relationship Management Tool</th>
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<tr>
<td>Posted Feb 04, 2019</td>
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<td>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</td>
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[+] 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
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).
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
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
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.
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
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
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

• 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.
Questions?