



REQUEST FOR PROPOSALS (RFP)

For

CRM SOFTWARE DEVELOPMENT AND IMPLEMENTATION

Response due date: April 17, 2019 at 3:00 p.m.

I. INTRODUCTION

The County of Monroe Industrial Development Agency d/b/a Imagine Monroe Powered By COMIDA (the "Agency"), located at 50 West Main Street, Suite 8100, Rochester, New York 14614 is requesting proposals from Vendors who provide Customer Relationship Management Solution software.

The purpose of this Request for Proposal (RFP) is to solicit proposals from software Vendors, systems integrators, implementation partners and/or Value Added Resellers (VARs) who can demonstrate that they possess the organizational, functional and technical capabilities to provide a Customer Relationship Management (CRM) solution that meets Imagine Monroe's needs. Imagine Monroe's preference is to select and begin implementation of a CRM solution in the 2nd and 3rd quarter of 2019.

II. NATURE OF SERVICES REQUIRED

A. BACKGROUND

Imagine Monroe (IM) currently does not utilize a centralized CRM application. Individual divisions record their interactions with citizens, businesses, customers and employees in a variety of means, using different desktop applications and isolated systems.

B. OBJECTIVES AND SCOPE OF WORK

Imagine Monroe is seeking a Software-as-a-Service (SaaS), cloud solution that will meet its core requirements out of the box with minimal modifications. Imagine Monroe expects the Vendor to perform the related professional services (e.g. best practices guidance, training, project management, implementation, integration and report development) in a timely and professional manner. The desire is to phase into a centralized system to take advantage of workflow, reporting, project monitoring and improved customer interaction tools such as mobile and web forms and surveys.

The ideal Vendor(s) shall have experience in successfully implementing the proposed solutions at similar agencies to IM and Monroe County and/or in larger agencies. The successful Vendor shall be responsible for the final IM approved design, installation, implementation and commissioning of the CRM system, including development of mobile and web forms, user acceptance testing, system integration and connectivity to existing resources.

III. PROPOSAL REQUIREMENTS

Responses to this solicitation must be submitted to the individual cited below, on or before April 17, 2019 at 3:00 PM. Please include one (1) original and three (3) copies of your proposal.

Jeffrey Adair, Executive Director
County of Monroe Industrial Development Agency
d/b/a Imagine Monroe Powered by COMIDA
50 West Main Street, Suite 8100
Rochester, New York 14614

Should you have any questions regarding this Request for Proposal, you may contact Jeffrey Adair at jeffreyadair@monroecounty.gov. Responses to any questions will be provided to all entities receiving a copy of this request for proposals.

IV. TECHNICAL PROPOSAL

The purpose of the Technical Proposal is to demonstrate the qualifications, competence and capacity of the Vendor seeking to undertake development and implementation of CRM software in conformity with the requirements of this RFP. The Technical Proposal should also demonstrate the qualifications of the particular staff to be assigned to the engagement. The award shall be made to the qualified Vendor whose proposal is most advantageous to IM with price and other factors considered. Other factors that may contribute to the selection process include but are not limited to the following:

- Project approach and understanding of IM's objectives and requirements.
- Supplier's implementation methodology and implementation success.
- Feedback from customer references.
- Supplier's installed base and experience with municipalities similar to IM
- Supplier's installed base with similar municipalities in the State of New York
- Ability to integrate with other IM systems
- Cost and quality of ongoing maintenance and support

Overall the CRM system must provide the following:

- a. Compatibility with IM's Technology strategic objectives.
- b. Alignment with the functional requirements as defined in this RFP.
- c. An intuitive interface and an easy learning curve to facilitate rapid adoption and minimize the need for external on-going training services.
- d. A system that is stable, secure and accessible and supports business processes, service delivery and transparency.
- e. Vendor must have an ongoing and sustainable product and corporate strategy to avoid obsolescence.
- f. Easy access to IM data for integration with other systems, reports and data analysis.
- g. Comprehensive library of standard reports and tools for end user ad hoc reporting and queries.
- h. Foster collaboration and process efficiencies between divisions.

V. COST PROPOSAL

An all-inclusive, not to exceed price relative to developing and implementing as described in the RFP should be provided as part of the RFP response. This cost should include all direct and indirect costs, including but not limited to annual fees, license fees and seat costs. The Agency will not be responsible for expenses incurred in preparing and submitting the Technical Proposal or the Cost Proposal. Such costs shall not be included in the Cost Proposal.

Information should be provided listing similar engagements that the VENDOR may have had with other entities of this type, performing similar tasks as required in this RFP.

VI. SELECTION OF VENDOR

The Agency will select a Vendor after evaluation of technical and pricing components of the responses received.

Imagine Monroe Responses to Questions
CRM Software, Development, and Implementation RFP
April 8, 2019

1. How many call/interaction types do you envision? Can you provide a list and/or examples?
50 Per Month, No
2. Is the mobile app for internal or external users?
Internal users
3. For the customer interaction tools such as web and mobile form, would IM accept a native mobile app or responsive design web page? What is your preference?
No Preference
4. How many interactions with citizens, companies, employees does IM expect?
Unknown at this time
5. How many users does IM anticipate and what are their roles?
10 – 20 users including Economic Development and Workforce Development Staff
6. Page two of the RFP states that responses to any questions will be provided to all entities receiving this RFP. If we received this RFP from a third party and not directly from Imagine Monroe (IM) can we submit a response?
Yes
7. Are there any additional RFP documents outside of the PDF entitled “Software-RFP”? If so, can you provide them?
No
8. Would IM extend the submission deadline until 4/24/19 to allow so that vendors can provide a comprehensive response?
Not at this time
9. What is the user count for licenses?
10 – 20 users
10. Is there a certain threshold we should be under in order to align with your budget?
No Threshold
11. Are there additional technical requirements to review?
No