



October 4, 2018

## ADDENDUM NO. 2

### REQUEST FOR PROPOSALS #4481-18 – CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

This Addendum 2 to Request for Proposals #4481-18 for Customer Relationship Management System is being issued to provide answers to questions received.

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Q: What is Spokane’s desire/requirement to keep Dynamics as their CRM?

A: Dynamics will be given the same consideration as other vendors.

Q: Can you disclose any budgetary information?

A: There is no established budget for this project.

Q: Is there a required/desired system go live date?

A: The City does not defined a “go-live”. We would like the Proposer to provide/recommend the project schedule.

Q: Kindly confirm if this is an international bid or limited to United States registered companies only.

A: The City requires the selected Firm to be licensed to do business in the State of Washington.

Q: Please confirm that the total quantity of users is:

24 read/write users

50 read only users

A: That is the correct quantity of users.

Q: Is there a desire/requirement to implement direct integration with those other systems and eliminate the manual data export/import process?

If so, please provide details on the "other systems":

- Name

- Integration support (soap, rest, database, other[specify])
- Volume
- What are the MSFT integration specific requirements?

A: The systems would be Accela and our current Utility Billing application.

We would expect integration to be soap or rest. All dependent on existing APIs.

Volume is 300k manual (60% are Utility Billing and 20% is Accela)

Only MSFT integration requirement could be Outlook.

Q: Please provide a complete list of all SR/Case types to be supported by the new CRM system. At the very least, please provide a count of SR/Case types to be included in scope.

A:

Online Service Requests – Case Types

- Ask the Mayor
- Bike Registration
- Closing Bill
- Garbage Change Existing Service
- Garbage Replace Cart
- Garbage Start Service
- Garbage Suspend Service
- Missed Collection
- Pothole
- Recycling Cancel Service
- Recycling Change Existing Service
- Recycling Replace Cart
- Recycling Start Service
- Recycling Suspend Service
- Turn Off Service
- Yard Waste Cancel Service
- Yard Waste Replace Cart
- Yard Waste Start Service
- Yard Waste Suspend Service

Internal Service Requests - Case Types

- Callback Needed
- Duplicate Bill
- Extra Pick-Up
- Follow-up Needed
- Foreclosure
- Name/Address Change
- Parking Meter Maintenance
- Stop Web Account
- SW Follow-Up Needed
- Turn On Service

Other - Case Types

- Abandoned Vehicles

Account Number/Bill Request  
Accounting/Finance  
ACH/Budget Billing Request  
Aquatics  
Asset Management  
Balance Inquiry  
Bill/Charge Explanation  
Bill/Charge Inquiry  
Building Services  
CHHS  
City Clerk  
City Council  
Civil Service  
Code Enforcement  
County  
Crime Check  
EBill - Start/Stop Paper Request  
Emailed Medical Pack-Out  
Engineering  
External  
False Missed Collection  
Fire  
General Disposal Question  
Golf  
Hearing Examiner  
Human Resources  
Inquiry About Prior Request  
IT  
Library  
Mayor's Office  
Municipal Court  
My Spokane  
New Occupant Inquiry  
Other  
Parking  
Parks  
Parks Registration  
Pay-By-Phone Request  
Payment Arrangement  
Payment Confirmation  
Payment Made at Counter  
Pick-Up Day Inquiry  
Planning  
Police  
Recycle/Yard Waste Question  
Retirement  
Risk Management - Claims  
SCRAPS  
Sewer  
Snow

Special Events/Block Parties  
SRTC  
Street  
Tax and License  
Title Company Inquiry  
Transferred to Solid Waste - Load Truck  
Transferred to Solid Waste - Supervisor  
Transferred to Solid Waste - YW Hotline  
Transferred to Solid Waste - Billing Dispute  
Transferred to Solid Waste - Commercial/Dumpster  
Transferred to Solid Waste - Other  
Transferred to Solid Waste - Prior Request Not Completed  
Transferred to UB  
Treasurer  
Urban Forestry  
Wastewater  
Water

Q: There appears to be a conflict between Chat is an integration with existing chat system and/or that Chat is a brand new functionality.

Is the requirement to use/continue to use the City's existing Chat provider or does the new scope include a whole new implementation of chat?

A: The City prefers that Chat be included in this new system. However, we currently use a stand-alone system that would require integration if Chat is not included in proposed solution.

Q: There are significant overlaps between Accela and today's leading CRM systems like Dynamics 365. What is the City currently using Accela for? Is the City using Accela for any of the following functional areas? And is the City planning on moving that functionality and users over to the new CRM system?

- SR/Case Management
- Licensing
- Permitting
- FOIA Management

A: Case Management, Licensing and Permitting. We are not planning to move that functionality over to CRM.

Q: What is the City's current screen-pop solution?

A: Custom solution built on Cisco Finesse – Vendor is Workflow Concepts

Q: What is the City's current telephony, soft phone, hard phone, and CTI technology?

A: Cisco VOIP, Call Center with IVR, Unity VM, Call Manager, Cisco Emergency Responder. We also have Calabrio Call Recording.

Q: Please list all channels that are expected to be in scope for this project. Examples:

- Website/Portal - Yes
- Phone -Yes
- Person Chat - Yes
- Social - No
- Chatbot – interested but not required
- Email - Yes
- IVR - No
- Other (please specify) – Walk Ins

Q: Please provide specific examples of what personalization is required.

A: The City does not use personalizations.

Q: Please list all channels that must provide some form of intake scripting.

A: The City does not use scripting.

Q: As the City is aware, to be able to provide a fixed price quote, the complete definitive list of the exact integrations that must be supported is necessary. Please provide the exact list of all integrations, the type of integrations the other systems supports (soap, rest, database, etc), the volume of data, in which direction the data flows, and any other data regarding the integrations that may be available.

A: The City is aware that an exact quote will be difficult due to lack of specifications. However, we are interested in the possibility of integration and not a must have requirement. If we were to integrate it would be Accela and Utility Billing (soap/rest).

Q: The only reference to data migration is under Project Management. There are no specific data migration requirements listed elsewhere in the RFP and none in the detailed requirements appendices.

Please provide detailed data migration requirements. Example: how many systems must be migrated? How many rows of data in each system? Any files or documents that must be migrated? How many knowledge articles? how many scripts? etc.

A: The City would like to further discuss with Proposer during demonstrations as that we do not want to migrate all data. Looking for recommendations around conversion.

Q: Is the City an Office 365 customer? And are all the user's current Office 365 users with City SSO?

A: The City is not currently an Office 365 customer, but is looking to migrate to Office 365.

Q: The RFP implies that "My Spokane 311" is an add-on (overlay) to the existing Dynamics 2013 solution.

The RFP states that the goal of the RFP's project is to "refresh" the existing system,

which by definition then includes "My Spokane 311"

Yet, in several paragraphs regarding integrations, the RFP states that the new system must integrate with "My Spokane 311".

There appears to be conflicting statements that "My Spokane 311" is both being replaced and integrated with.

Please provide clarification of exactly what "My Spokane 311" is, and if it is being replaced by the new solution or will continue to exist as a stand-alone enterprise application that must be integrated with (and include all integration details).

**A: A 311 accelerator was added to Microsoft Dynamics CRM to be used by my Spokane 311 which is a City department. We are looking to replace the current CRM solution.**

Q: Please clarify if "mobile users" is referring to Spokane city personnel using a mobile app for backend work tasks, or for public/constituent self-service mobile experiences.

**A: Mobile users are referring to Spokane City personnel only.**

Q: Sending and receiving SMS text messages requires the use of a cell carrier authorized SMS broker. Who is the City's current contracted SMS broker?

**A: The City does not use SMS text messaging.**

Q: Is it the City's intent that paper document scanning hardware and software is also part of the scope of this project?

**A: No.**

Q: Or that The City will continue to use existing scanning hardware and software?

**A: Yes.**

Q: Is there a new requirement to integrate the City's existing scanning hardware and software with the new CRM system?

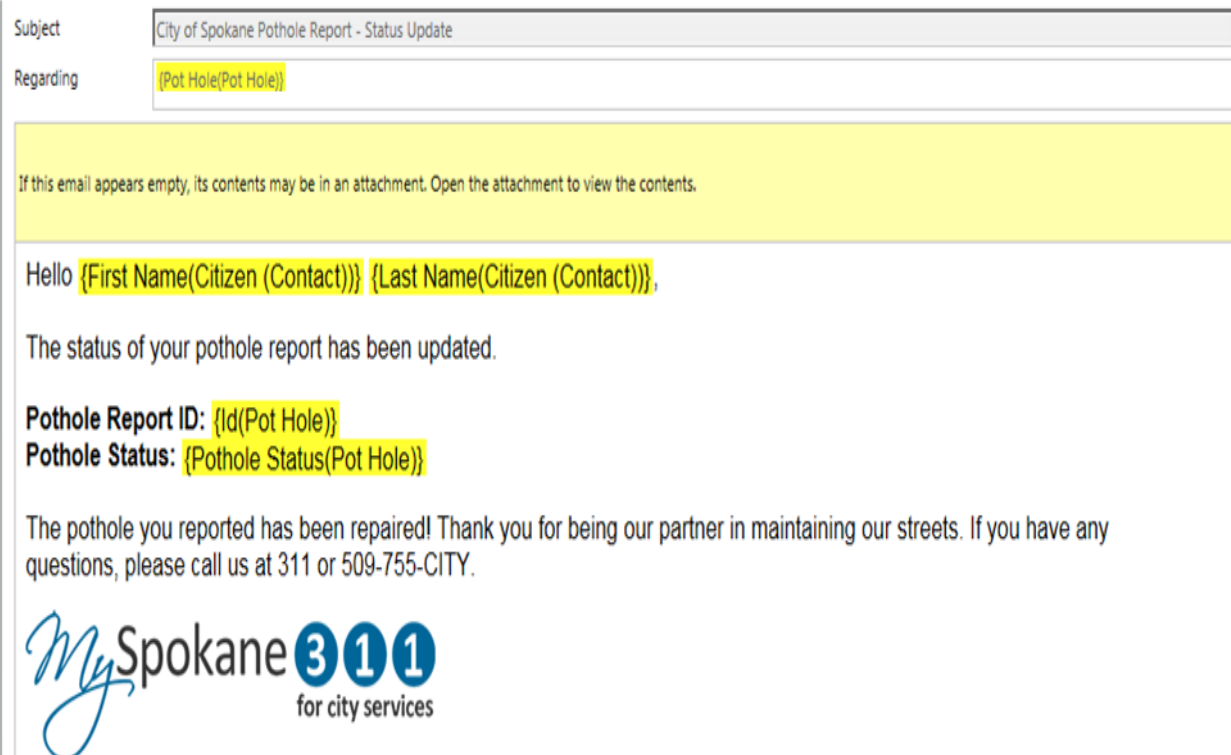
**A: No.**

Q: Please specify what The City's email platform is, its version, and if it is Internet facing or not.

**A: Outlook 2016 and Outlook Web Access.**

Q: Please provide details and examples of what "automated correspondence and fulfillment" are.

**A:**



Q: Please provide examples and descriptions of the "documents" to be created.

A: The City does not currently create documents today but would potentially like to in the future.

Q: are these extracts for selective data? Or is The City looking for a complete replication of the entire database? What is the desired format of the data, MSFT Excel?

A: The City needs access to the data in order to create internal reporting. The City is not looking to replicate but to extract in order to manage City Wide data and reporting.

Q: Ability to perform pre-defined queries from the field against the CRM system database for those needing to view historical service request data based on type, location or participants

Please provide a couple example use cases to clarify the requirement.

A:

## Potholes - By Quadrant

### Filter Summary

Quadrant	Id	Pothole Location	Reported Level	Created On	Quadrant	Description
<b>NE</b>						
	PR-18-003949	800 N Hamilton St	3	9/19/2018 2:25 PM	NE	Northbound Hamilton on the east side of the street from Trent to Sharp is a disaster. There are numerous potholes and one gigantic pot "bump" in the road. There has been a BUMP warning sign on the sidewalk for at least 3 month but no repairs. If you hit the bump it jars your car and you can't scoot around it given the crumbling condition of the lane closest to the sidewalk. This is only going to get worse with rain and snow as the ground freezes and thaws. This is a heavy traffic roadway and it's a mess. Appreciate some repair work. Thanks!
	PR-18-003956	St. Thomas Moore Wy & Nevada	2	9/20/2018 2:56 PM	NE	St. Thomas Moore Way, E/O Nevada
	PR-18-003957	200 E Sierra Ave	1	9/20/2018 3:05 PM	NE	in front of 212
<b>NW</b>						
	PR-18-003965	4103 N Wall st	2	9/21/2018 9:38 AM	NW	nw corner of wall and lacrosse on wall 1' wide more than 6" deep
<b>SW</b>						
	PR-18-003943	Indian Canyon Dr	1	9/14/2018 8:13 PM	SW	Heading northbound on Canyon Dr. The drive around Indian Canyon Golf Course. Lots of pot holes. To many to count.



## Utilities - Inactive Previous Day

### Filter Summary

ID	Request Type	Created By	Created On	Modified By	Modified On
UR-18-47432	Pay-By-Phone Request		7/12/2018 11:07 AM		9/20/2018 3:12 PM
UR-18-47439	Pay-By-Phone Request		7/12/2018 11:19 AM		9/20/2018 3:12 PM
UR-18-47445	Pay-By-Phone Request		7/12/2018 11:31 AM		9/20/2018 3:12 PM
UR-18-47451	Transferred to UB		7/12/2018 11:40 AM		9/20/2018 3:12 PM
UR-17-59283	Payment Made at Counter		10/6/2017 4:24 PM		9/20/2018 3:28 PM
UR-18-24282	Turn On Service		4/9/2018 11:23 AM		9/20/2018 3:22 PM
UR-18-25906	Bill/Charge Explanation		4/16/2018 2:04 PM		9/20/2018 1:13 PM
UR-18-33430	Pay-By-Phone Request		5/16/2018 4:15 PM		9/20/2018 1:13 PM
UR-18-42534	Transferred to UB		6/21/2018 4:00 PM		9/20/2018 3:12 PM
UR-18-54550	Pay-By-Phone Request		8/8/2018 10:28 AM		9/20/2018 1:13 PM
UR-18-59310	Payment Arrangement		8/27/2018 12:44 PM		9/20/2018 3:12 PM
UR-18-62534	Pay-By-Phone Request		9/10/2018 10:07 AM		9/20/2018 3:12 PM
UR-18-62538	Other UB Request		9/10/2018 10:09 AM		9/20/2018 3:12 PM
UR-18-64361	Duplicate Bill		9/17/2018 11:56 AM		9/20/2018 9:52 AM
UR-18-64423	Duplicate Bill		9/17/2018 1:43 PM		9/20/2018 3:11 PM
UR-18-64532	Follow-up Needed		9/17/2018 3:38 PM		9/20/2018 7:32 AM
UR-18-64621	Name/Address Change		9/17/2018 5:01 PM		9/20/2018 7:33 AM
UR-18-64626	Name/Address Change		9/17/2018 5:11 PM		9/20/2018 7:42 AM
UR-18-64645	Name/Address Change		9/18/2018 8:23 AM		9/20/2018 7:37 AM
UR-18-64696	Name/Address Change		9/18/2018 9:49 AM		9/20/2018 7:44 AM
UR-18-64716	Turn Off Service	CRM DMZ Web Interaction Service	9/18/2018 10:11 AM		9/20/2018 3:46 PM

Q: Please provide details on The City's existing document scanning software and hardware vendors, version, etc.

A: Canon model C7260.

Q: Does the 311 platform currently integrate with social media platforms like Facebook, Twitter, or Instagram? Is this sort of integration in scope for this solicitation?

A: No and no.

Q: Is ArcGIS the required technical solution for this or is other mapping software acceptable?

A: ArcGIS is the required solution.

Q: Mobile Device Interface - Is this for back office or front office use of the system?

A: Back office.

Q: What is the city's definition of "real-time" data in terms of maximum latency?

A: Five minutes.

Q: Increasing customers' use of self-service options. What is the current measure, target, and milestone schedule?

A: The City is not currently measuring. The City is looking to establish measurements.

Q: Improving call related measurement tools and tracking of end-to-end call flows. What are the current measures, targets, and milestone schedules?

A: The City is not currently measuring. The City is looking to establish measurements.

Q: Create application based service level agreement rules. Can the city clarify what is in scope for application based SLAs?

A: The City does not currently use SLAs but would like. The City is looking for Proposer to help establish this process.

Q: Establish a new user or group, deactivate or delete existing users or groups - What mechanism does the city use today to do this?

A: This is a manual process for The City now and we are interested in automating for future.

Q: Which government standards are required to be met? City, State, Federal?

A: City and State.

Q: Is the city comfortable with blocking "standard desktop files" that are commonly used by malicious actors to gain unauthorized access to internal systems?

A: Yes.

Q: What is the city's expectation for test environments? What Dev/Test environments does the city have today aside from the production instance of Dynamics?

A: Single test environment.

Q: Ability to recognize customer via phone/ISP and pull up account information directly on screen - How does the city do this today?

A: Custom script on Cisco Finesse.

Q: What operating systems does the city support on employee end points? What browsers are supported?

A: Windows 10. Browsers are Chrome, IE 11 and Edge.

Q: Does the city employ encryption software on endpoints to mitigate the risk of lost devices? What is the maximum file size the city requires to be downloaded to an endpoint?

A: The City uses BitLocker for drive encryption on all laptops only. Police and Fire departments are just beginning to use BitLocker. The City does not have any file size limitations.

Q: Does the city have a set of defined roles and what resources they are granted access to for use in this solution?

A: Yes.

Q: Does the city desire multifactor authentication for all users of the system, both privileged and non-privileged users? What form(s) of multifactor authentication does the city support today?

A: The City desires the potential for multifactor authentication but is not currently utilizing any.

Q: What is the city's desired maximum time to live for an authentication token?

A: Two hours.

Q: What is the city's requirement for data retention?

A: Six years

Q: In order to respond to this RFP, are we required to be licensed to do business in the State of Washington? Or, upon contract award, can we obtain this license?

A: A Business Registration is required in order to contract with the City. A Proposer does not have to be licensed (registered) to submit a Proposal response to this RFP.

Q: What are your greatest pain points with the existing system?

A: 1. Memory leaks in web browser causing slow responsiveness.  
2. Lack of integration with chat.  
3. Poor email functionality.  
4. Knowledge base is clunky to use as well as maintain (auto deletes, reminders to update, links to other articles, etc.).  
5. Inability to search across domains (public records requests issues).  
6. Consistent issues with screen pop solution functionality.  
7. Inability to use dashboards or simple reports are compounded by the way we designed our CRM into different modules, so that's less of an issue with the system itself, but are looking to address/fix.

Q: Will all 8 call takers be creating cases?

A: Yes.

Q: Please describe how the 3 public counter staff will use the CRM system.

A: They will be logging transactions completed for walk-in and online customers. This may involve case creation or simply logging interaction for billing purposes.

Q: Please describe how the 2 supervisor will use the CRM system.

A: They will be auditing the input of staff to ensure compliance with SOP as well as running reports on activities. They may also be responsible for case entry in the event it is necessary to backfill for other staff.

Q: Please describe how the 1 manager will use the CRM system

A: The manager will use CRM to analyze data, run reports, create/report on dashboards.

Q: Can you explain how the “remaining 50 users” pull data submitted online or from My Spokane 311 staff to complete service requests in other systems?

A: The other users pull data from CRM to complete their service request in other systems. For example, a request to change garbage can size is entered into CRM by 311, but Solid Waste reads the request and then completes the request in their own software systems.

Q: Do the “remaining 50 users” need to access the CRM system in any other way other than to read data?

A: At this time, besides the ability to deactivate or mark record as completed, no. Some of the 50 (2-3 supervisors) may also require the ability to run reports.

Q: Would work order management be maintained in 3rd party systems the CRM will integrate with? (RFP calls for service request management, but I do not see much on possible work order management)

A: That is the desired outcome – Accela is the 3<sup>rd</sup> party vendor for work orders for code/parking, and for our utility billing system, we are currently pursuing a new vendor.

Q: Is there currently a mobile app for Spokane or is anything done like that through the community portal?

A: The City does not currently have an app, only the community portal (city website).

Q: I see residents can pay bills on community portal, are you interested in the CRM also have billing functionality?

A: At this time I believe this would remain separate as the bill pay function is linked to our

bank. But the City still needs to keep some integration on the community portal so this is centrally located along with other service requests.

Q: Do you want previous system data migrated to the new system?

A: The City would like to further discuss with Proposer during demonstrations as that we do not want to migrate all data. The City is looking for recommendations around conversion.

Q: Are there any other ways other than call center, portal, and email the city of Spokane would like to use as a medium to create service requests? (social media, chat box, etc.)

A: The City does use chat that is not currently integrated with our CRM, which is something we are interested in. The City does not use social media.

Q: Is Spokane interested in reducing the number of potential duplicate service requests?

A: Yes.

Q: Can you elaborate using the CRM for economic development in future state?

A: The City of Spokane just launched a marketing campaign in September to attract new companies and employees to Spokane. Staff are using the current CRM solution to track leads and would like to maintain that ability.

Q: What parts of the customer journey do you want automated? (Email being sent to citizen, more self-service, auto-routing of SRs, etc.)

A: More self-service options, emails to citizens including updates and survey requests, potential chatbox automation if integration between UIS and CRM is possible regarding bill balances. Automatics GIS location would be helpful, too.

Q: Section 1.1 Background mentions that 50 users primarily use CRM as a read-only function to enter data into other systems. Does Spokane want to integrate the new CRM with these other service request or work order systems?

A: Yes – Accela and our new (TBD) Utility Billing System

Q: Section 4.4 Paragraph E states that the City is further anticipating a solution that will support a variety of other platforms. Does the City also want social media channels included as part of this? If so, what channels?

A: The City is not interested in social media at this time.

Q: Section 4.4 Paragraph G Training asks for a training plan to include user and admin training as well as train the trainer training, is the City expecting the vendor to propose and cost all four types of user training?

A: The City would be conducting Train-the-trainer but would require the Super User training to be sufficient in order for City to launch Train-the-Trainer.

Q: Section 7 Paragraph A section 6 Integration mentions departments using a legacy system that will require the new CRM to provide integration capabilities. Is it the expectation by the City that the new CRM have integration capabilities and these capabilities would be implemented as needed by the City, or does the City wish for the vendor to build and test the new integrations? If the City expects the vendor to build all required integrations, can the city please list each system that departments currently use?

A: The City would like a cost proposal for the Firm to build the new integrations. Two main integration points are Accela and Utility Billing. We would like bi-directional. Currently we are only batching.

Q: Appendix A #5 please clarify or provide an example of what is a multi-department request?

A: For example, our homeless encampment reporting goes to four (potentially) departments – housing, police, and code or parks. So need the ability to go across departments, but limit their ability to see other request types.

Q: Appendix A #30 please clarify what type of online archive processes the City would like to use. Would the archive requirements vary by service request or issue type?

A: The City is looking for recommendations/best practices around archiving all record data for public record retention, mitigating performance issues.

Q: Appendix A #33 please provide an example of how the City would like for the CRM to have a seamless integration with Microsoft Outlook email.

A: The City's current system does not integrate with Outlook, requiring users to manually copy and paste from Outlook into CRM. The email functionality within CRM is also poor, both in terms of user-friendliness, but also that contacts from the Outlook Global Address book are not accessible. We would prefer to email from within CRM, but be able to access contacts from Outlook.

Q: Appendix A #36 and #37 please explain or clarify why the word sales is in this requirement? Does the City wish to track purchases by contacts, citizens or vendors? Or is this a mistake? By sales customer/contact, does the City mean the citizen? Additionally, please clarify or explain what a project is.

A: The City just launched a marketing campaign in September to attract new companies and employees to Spokane. Staff are using the current CRM solution to track leads and would like to maintain that ability. So by sales we mean marketing leads/customers.

Q: Appendix A #41 please clarify what is meant by customer account information that the CRM would display automatically based on caller id or ISP?

A: This would be the appropriate contact in CRM. Essentially, the CRM would read the incoming call number and search for contact matches so when the agent answers the phone they already have the contact's history in front of them.

Q: Appendix B General System Specifications #2 - What version of Internet Explorer is the City currently running?

A: IE11.

Q: Appendix B - if the vendor is proposing a SaaS solution hosted offsite, does the vendor still need to answer the Database, Network and Servers and Operating system requirements? Or should we just answer those that would apply to connecting the City to the SaaS environment for use of the new CRM?

A: If only providing a SaaS solution hosted offsite then you do not need to answer the Database, Network and Servers and Operating system requirements. Please note 'Not Applicable'.

Q: Appendix C Application Architecture #2 ability to auto fill zip code information - is this for all US addresses or just for addresses within the city limits of Spokane? Does the City GIS provide a zip code geo area layer or does the City expect the vendor to provide this service using USPS zip code services?

A: The City is interested in nationwide, but the main desire is local (Spokane county). The City would be able to provide a GIS layer for this.

Q: Appendix C Application Architecture #13 please clarify what the City would expect for a customizable user interface of a packaged already developed CRM solution.

A: The City expects that different users would see different things based on their levels of permission. We are not expecting customization. Configuration would have been a better description.

Q: Appendix C Application Architecture #17 please clarify what the City means by user defined? Is the user in this case the City (and user-defined would mean the configuration driven settings for each of these settings) or the actual city employee using the CRM?

A: Your first assumption is correct. The user is the City and user-defined means the configuration driven settings for each. These functions will be utilized by City users of the system.

Q: Appendix C Workflow #1 please explain or provide an example of citizen segmentation rules.

A: Age, gender, income, housing type, education, etc.

Q: Appendix C Mobile Requirements #6 Does the City want a reactive design mobile app that works on all mobile device browsers, just Android and Apple specific apps, or both?

A: The City is requiring Apple and Android at minimum.

Q: Page 17, paragraph B Specific Requirements - please clarify if the City wants the Firm Response values from the table (Yes, Pending, Extra, No) used only for Appendix A (as stated), or for all Appendix A, B, C and D table responses where appropriate.

A: Correct, the City does want for all 4 appendices. We originally only had one appendix, and apologize for confusion.

Q: Appendix B, C and D - if the requirements are explained in the narrative part of the proposal provided in section 4.3 and 4.4 responses, how does the City want those requirements responded to in the appendix? Is it adequate to provide a response and reference back to the narrative response of the proposal for each functional requirement or does the City desire a full response in the appendix as well?

A: If your answers are redundant than you can refer back to the narrative responses of the proposal. Just note accordingly.

Q: Functional requirements have a few questions revolving around a sales process such as sales opportunities. Will this CRM need to contain a sales component or will this system be just for the customer service aspect?

A: The City of Spokane just launched a marketing campaign in September to attract new companies and employees to Spokane. Staff are using the current CRM solution to track leads and would like to maintain that ability. So by sales we mean marketing leads/customers.

Q: What version of Microsoft Windows will be used to access the recommended solution?

A: Windows 10.

Q: Would you be able to provide a copy of the RFP in Word?

A: Yes.

Q: What are the main issues and/or limitations of your current Microsoft CRM that you are looking to solve with this new CRM solution?

A: Memory leaks in web browser causing slow responsiveness.

Lack of integration with chat.

Poor email functionality.

Knowledge base is clunky to use as well as maintain (auto deletes, reminders to update, links to other articles, etc.).

Inability to search across domains (public records requests issues).



Consistent issues with screen pop solution functionality.

Inability to use dashboards or simple reports are compounded by the way we designed our CRM into different modules, so that's less of an issue with the system itself, but are looking to address/fix.

Q: What budget does the City have allocated for the CRM Solution?

A: There is no established budget for this project.

Q: Has the City seen demos from CRM systems? If so, which ones?

A: No.

Q: Section 5.2 evaluation weighting and scoring. When providing scores (e.g. 60 points) for the cost proposal, what time frame will you be considering (Total 1st year costs, total 5 year costs, total 10 year costs, etc)?

A: The City would like to see total five year costs.

Q: Do you expect data migration from your existing system? If so, how many cases and/or people/accounts do you expect to get migrated to the new system?

A: The City would like to further discuss with Proposer during demonstrations as that we do not want to migrate all data. Looking for recommendations around conversion.

Q: Will the integration be done directly to each system or through an enterprise service bus (ESB)?

A: Directly. The City is looking at two systems for integration; Accela and our TBD Utility Billing.

Q: Does the City prefer an on-premise solution or one hosted in the Cloud?

A: The City doesn't have a preference per se but would like to see a cost proposal for both if possible.

Q: You mention integration to Chat. What current Chat system are you using? Would the City be own to utilizing the inherent Chat system with the proposed new CRM?

A: Currently the City is using SnapEngage by SAP as our chat solution. While we desire a chat solution as part of the CRM system, we are open to CRMs without chat that will integrate with SnapEngage.

Q: What will the future Utility Information System be that will require an integration?

A: The City has issued a Request for Proposals for replacing our current Utility Billing system. Proposals are due October 8, 2018.

Q: You mention the need for Computer Telephony Integration (e.g. Screen pop). What telephony system and version is the City using?

A: Cisco VOIP, Call Center with IVR, Unity VM, Call Manager, Cisco Emergency Responder. The City also has Calabrio Call Recording.

Q: How many service request types does the City current have in its system? How many does the City anticipate in its new CRM system?

A: Around 80 different service types. The City would anticipate 80–100.

Q: Is the intent of the city to move away from the Dynamics CRM? If so, have you reviewed other applications or platforms to satisfy on-going needs?

A: The City is exploring all CRM options to see what best meets our needs. We have not reviewed any other applications or platforms.

Q: Do you have a “cloud first” approach/strategy to applications?

A: The City would prefer a solution that is not on-premises, but this will not be a factor for excluding a Firm’s proposal.

Q: For “Survey integration”, do you have existing tool in mind or would you like us to recommend one?

A: The City would like a recommendation.

Q: What product do you currently use for Caller ID integration? What are your internal telephony systems and do you expect to keep them in place?

A: Cisco VOIP, Call Center with IVR, Unity VM, Call Manager, Cisco Emergency Responder. The City also has Calabrio Call Recording. We are not planning on replacing our telephony systems.

Q: Can you please explain what “mobile device interface” means? (Page 3). Specifically, do you Q: want the application to be mobile ready or is the intent to have a mobile application that is created independent of the CRM?

A: At minimum, the City desires mobile ready. We currently do not use a mobile application, but are interested in exploring this option if available as part of CRM solution. We do not desire to create one independently.

Q: What does “interface with existing databases” mean? (Page 15). Can you specify what databases they are and what technology are they built on? How does the integration work today? Any specific tools used for that integration?

A: Interface with Accela and our TBD Utility Billing systems. The City utilizes SQL and Oracle databases.

Q: Do you have current tools/applications to create electronic forms? If yes, is your intent to continue using that technology or is the expectation that the new application will provide tools to create electronic forms?

A: The City would like the new solution to provide tools for electronic forms.

Q: User IDs and Passwords must be encrypted while in transit and at rest. Passwords must support configurable password complexity, age, and reuse limitations. Is this requirement mandatory? Is the City willing to accept passwords that are hashed?

A: Passwords that are hashed are acceptable.

Q: No section: Are bidders allowed to provide any exceptions to the RFP requirements? For example, there are requirements that would not apply to cloud-based solutions or, in some cases, the Cloud Solution Provider does not fully meet requirements explicitly as written. How are bidders to include these exceptions or assumptions, with explanation, in their proposal for the City's review and consideration without being non-compliant with the RFP?

A: If the Proposer is only going to propose a cloud-based system then you can mark those areas as non applicable. You will not be considered non-compliant.

Q: Additional Question 1: For the competitive advantage and to provide the best price to the City for the services, we would like to keep the Cost Proposal as "confidential" information until the contract is awarded and all RFP documents become a part of public record. We would hereby again request the City if the "Tab D: Cost Proposal" can be submitted as part of the whole package but in a separately sealed envelope.

A: Once the City receives any documents, the City cannot guarantee exemption from release if the City received a public records request. Language in the Request for Proposal document states **"The City will consider a Proposer's request for exemption from disclosure; however, the City will make a decision predicated upon state law and regulations. If any information is marked as proprietary in the Proposal, it will not be made available until the affected Proposer has been given an opportunity to seek a court injunction against the requested disclosure."** If additional or different information becomes available, it will be provided as an Addendum to the Request for Proposals.

Q: Additional Question 2: We understand that we have to include our response to Appendix A, B, C and D (Page 17 to Page 35 of the RFP doc)) as part of the "Tab B: Technical proposal". Please validate our understanding.

A: The answers to Appendices A – D does not have to be part of the technical proposal. The answers can remain within the Appendices.

*Connie Wahl*

Connie Wahl, C.P.M., CPPB  
Purchasing

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**PLEASE NOTE: A SIGNED COPY OF THIS ADDENDUM MUST BE SUBMITTED WITH YOUR PROPOSAL, OR THE PROPOSAL MAY BE CONSIDERED NON-RESPONSIVE.**

**The undersigned acknowledges receipt of this Addendum.**

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**Company**

\_\_\_\_\_  
**Authorized Signature**