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ADDENDUM NO. 3

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

1. This Addendum 3 to Request for Proposals #4481-18 for Customer Relationship Management System is being issued to provide answers to questions received. Questions are identified with "Q". Answers are identified with "A" in red text.

   Q: Is the City of Spokane going to continue using Cisco Finesse?
   A: At this time the City does not have any plans to move away from Cisco.

   Q: Is the City of Spokane planning for a Time and Materials or Fixed Fee engagement?
   A: The City does prefer fix fee engagement.

   Q: Who is the audience calling for support in regards to the support section in the appendix?
   A: This is referring to maintenance support from the contracted Firm.

   Q: For the portal component including service requests and constituent items, would that remain in your existing website like it is today or be in a separate portal?
   A: This would remain on the City's existing website.

   Q: Could you provide some examples of how you would perform field services?
   A: The City is primarily interested at this time for our parking meter maintenance team to be able to make updates in the field on a mobile device on a case. However, The City would like to explore expanding this to our Street team and our Solid Waste team for same reason. To be able to receive cases in the field and update on site.

   a. Would these field services require offline capability? A: Yes.
   b. Would you be completing work orders? A: Yes.
   c. Would the field service users require vehicle directions and/or vehicle management?

      A: No.

   Q: What type of equipment would be used for completing field services?
   A: Mobile devises – phone or tablet. TBD.

   Q: You mentioned about using leads to capture potential opportunities. What level of details would you like to use in the new solution?

   a. Would you manage campaigns in order to generate new leads?

      A: Yes – to date the City has run a few "campaigns" that would be worthy of noting, tracking and using to communicate effective ROI.

b. What methods of communication would you like to use to advertise or send out materials?

A: Typically phone calls, emails, Eventbrite registration, etc…if we could use a DL and manage campaigns from a marketing/sales application in CRM that would be great – our current system will allow us to do this.

The City also conducts quarterly, semi- and annual events that would be good to coordinate better with CRM; i.e. State of the City, and MACEV come to mind.

Q: Is the City of Spokane interested in also managing events or campaigns in order to generate additional leads?
A: The City is also looking at conducting other events and coordinating communication where the mayor or administration may be out of the city participating in regional activities - Clean technology conf., AWB policy, etc.…other City outreach to Spokane Alumni.

Q: What other Microsoft Products is the City of Spokane Licensed for (O365, Azure, etc) & where are those products hosted?
A: Outside of Dynamics we are currently using Microsoft Office 2016. The City is also in the process of purchasing Azure.

Q: It appears that the current 311 solution has 24 individuals requiring full access & 50 individuals requiring read-only access to CRM information. Is there a need to expand access to CRM information to other departments?
A: There is interest in expanding, but license cost is currently cost prohibitive. The City is hoping this RFP will allow reconsideration of expansion.

If yes, what types of functionality would be required for these additional individuals and how many individuals would there be?
A: Functionality of interested parties largely matches full access (entering contact info and tracking case history), though some users might only be read-only. Unknown users at this time, but estimated at less than 100.

Q: We are a Microsoft Reseller of Government Licenses. Would the City entertain purchasing licenses directly from us for this project should Dynamics be selected to move forward?
A: I don't think The City can because the license is a 3 year contract with SHI.

Q: Do the current Microsoft Licenses have Software Assurance attached to them?
A: No

Q: Will the department require data from the existing 311 solution to be migrated to the new platform?
A: The City would like to further discuss with Proposer during demonstrations as that we do not want to migrate all data. We are looking for recommendations around conversion.

If yes, can you please describe?

i. Critical data to be migrated
ii. Optional data to be migrated
iii. Data that will not be migrated

Q: The requirement calls for the firm to create, review approve and publish new entries to the knowledgebase. Should this be considered a functional requirement of the 311 solution, or is the City asking the selected vendor to perform these services on behalf or in conjunction with department staff?

A: This is a functional requirement of the CRM system. The City will be performing these services.

Q: How will the department obtain knowledge from other departments to update the knowledgebase?
A: The City currently receives information via emails, phone calls, and face-to-face meetings. Then take that information to create knowledge base articles.

Q: Is there a desire to have each City Department update its own section(s) of the knowledgebase?
A: No

Q: Is the knowledgebase for internal staff, external staff, or both?
A: Internal staff at this time. The City would be interested in a solution that provides both, but is not a requirement.

Q: The requirement calls for the ability to validate address of the request through interface with City GIS.

i. How does that function work currently today?
A: It does not.

ii. What is the desired outcome for address verification?
A: We want to be able to track cases to parcels/addresses as well as be consistent in data entry regarding these addresses. So 123 E. Main St. is always entered as such instead of 123 East Main or 123 E Main Street, etc.

Q: The requirement calls for the ability to capture and view contact information and history from all channels.

i. Define the term channel – A: Medium: phone, online, email, chat, other software systems.
ii. Please provide a list of existing channels – A: Phone, online, email, chat
iii. Please provide a list of desired channels – A: phone, online, email, chat, other software systems.

Q: The requirement calls for the ability to interface with existing databases for "read only" access.

i. How many databases are accessed in this manner today? – A: None
ii. Are there new/future databases that will need to be accessed? – A: The City would like the ability in the future. The City would want to discuss with Proposer.

Q: What happens when service request data is sent to another department?

i. How is the 311 agent notified that the service request has been received? – A: 311 enters the request for other departments to fulfill. If it's been submitted online, it goes directly to that department. Most times they are not notified, they just need to check the CRM system to see if there are new cases, but for high priority case types, an email notification is generated from CRM and sent to the department.

i. How does the receiving department notify the 311 agent the estimated time required to resolve a request? – A: They do not. The City has a known service guidelines that we share with customer at initial contact.

ii. What happens when a citizen calls back the 311 agent looking for a status update?
A: The 311 agent will look up the case in CRM as well as the software system the other

department used to complete the request, and the City relays the status to the customer.

iii. How does a service request get closed out if it has been forwarded to another department?
A: Once the other department has completed their request, they deactivate the record in CRM, which closes the case.

iv. How is a service request status updated on the 311 website?
A: Not all service requests are available online, but for some the City has built an interface with our website to CRM. Once the case is updated in CRM, it updates on the website as well.

1. How much detail is included in the service request update? –
A: Very little – usually just open or closed status, as well as date and time of initial request and request type.

Q: What metrics are followed to ensure a service request is closed out in a reasonable amount of time?
A: None at this time. Departments will run reports to check for outstanding requests, but there are no metrics.

Q: Can we assume that departments using the 311 Contact Center CRM directly will use the selected CRM platform to create a closed-loop processing system between the Contact Center & those departments?
A: This is informal at this time, but this is why the City is seeking system integration to reduce the manual effort involved in this.

Q: Please list all departments and associated legacy systems that are currently integrated with the current 311 system.
A: The City is currently not integrated with any legacy systems.

i. Does each legacy system have its own direct connection to the 311 system, or is there a middleware solution that each system including the 311 system connects to?
ii. Please describe how each legacy system connects to the 311 CRM system and identify what data gets passed between the systems.
iii. Is data integrated between systems updated real-time, in batch updates, read only (for example iframe screens) manually, or in all or any other ways?
iv. What is the criteria for determining if a legacy system needs to be 'integrated' with the 311 CRM system?
v. Please describe the functionality required by each integration.

Q: For departments using a legacy system that is not interfaced to the 311 Contact Center CRM applications and not using the call center directly, what is the desired functionality for a 'closed-loop' processing system?
A: Not applicable at this time. Departments not using the call center are using CRM to track contacts and not service requests, so there are no legacy systems to interface.

Q: Can you explain in further detail the process you envision for the "remaining 50 users" deactivating and/or marking records as completed?
A: These users currently receive requests in CRM that detail what action needs to be taken in a different software system. Once they have completed that transaction, they deactivate the record in CRM. This signals the case was completed. So they are read-only with this exception of deactivating the record to indicate it was completed.

Q: Do you currently consider the “remaining 50 users” deactivating and/or marking records completed to be an approval process?
A: Not sure I understand the question. This process most closely represents a workflow process of retrieving data and then acknowledging it was received and completed.

Q: How many text messages do you anticipate sending per month?
A: The City currently does not text and has no email opt-in option for push notifications we would like to send so unknown at this time.

Connie Wahl

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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