Request for Proposal 2022-002

Request for Customer Relationship Management (CRM)

Questions And Answers

1. **(RFP Requirement) Will you allow TAEO to evaluate your disaster recovery/business continuity plan on a yearly basis? (from section 9) (Question) What will the evaluation entail? Will TAEO do the evaluation themselves at their own cost?** Every company that provides SaaS services should have a DR\BC plan, we would like to see what that plan looks like in the event the vendor we select gets hit by ransom ware etc. What would the plan be to keep SaaS customers functioning as normal? We would just need to see what the plan is and if it changes on a yearly basis.

2. **(RFP Requirement) Application Response Times: Vendor must provide approximated response times that can be expected from the application. Vendor must also provide approximated transaction loads/ numbers of transactions through your service. (Question) What kind of transaction?** Case transactions, data processing limits if any per month, year etc. Is there a limitation on the number of transactions i.e., cases TAEO writes up or processes through the system, etc. **(Question**) **Did you mean the maximum limit**? Yes, is there a limit and if we go over the limit will there be up charges?

3. **(RFP Requirement) Can the Vendor provide a database solution in the event there is no database of record? (Question) Can you please elaborate further?** If TAEO does not currently have a centralized database for the information they work with, and in multiple formats, does the vendor provide a solution to centralize the data used. **(Question) Do you mean if in case the City of Tulsa has no existing database or records, does the solution has a database out of box?** Yes, TAEO would like a database solution out of the box.

4. **(RFP Requirement) Does the system allow developers to transfer changes to applications, rather, than move the entire application, from the PC to the production? (Question) Can you please elaborate? Did you mean can the developers make DIRECT changes to the application on the production cloud?** Yes that is what we meant.

5. **(RFP Requirement) If other departments or areas of the business choose to be implemented in the SaaS solution, what costs are associated with their integration? (Question) Does this refer to additional users needing to be added to the CRM?** Yes, what costs to include other users not originally in the quote. **(Question) Or do you mean other technology from different areas of the business that would need to be integrated with the CRM?** Yes such as an API to integrate other city applications if needed

6. **(RFP Requirement) In Section 13. "What is the history of your product releases?" (Question) Microsoft Dynamics 365 has gone through a long history in developing and updating to be among the best in the market. Given the page limit, would answering the most significant history and some upcoming releases be suffice for this question?** Yes, that would suffice. With this question we are looking to know how your product releases have gone and if they have impacted your customers in any way.

7. **(Question) Do you have an anticipated budget for this project? If so, will you share the budget amount.** Yes, $150,000 to $200,000 including limited hourly maintenance options and support.

8. **(Question) With the expectation of the vendor completing data migration from existing systems, please describe the data, the number and type of records, the total size of the files, etc. Is your data currently in a spreadsheet, database, etc? Do you have a data analyst who can consolidate data prior to uploading?** TAEO has 200 business partners whom with we routinely communicate and 1,000 constituents whom we have passive communications such as newsletter mailouts. These communications are primarily by email. TAEO has approximately 150 legacy agreements in the form on grant agreements, development and redevelopment contracts, incentive contracts, leases, promissory notes (loans) and mortgage documents. These files range in size from an average of 3,000 to 5,000KB to the upper end of 12,000KB. TAEO also has numerous tracking excel spreadsheets and access databases that TAEO would like to consolidate into a cloud-based solution. TAEO doesn't have an inhouse data analyst.

9. **(Question) Exhibit A lists "Future enhancements and integrations." Do you wish vendors to include any of these integrations in the quote for the current project?** We do not wish to have these future integrations in the quote as we do not know at this time what those integrations would be. **If so, do the systems you wish this solution to interface with have APIs available?** Does your cloud solution include an API we could leverage in the future if we need to integrate with other systems? **If so, are they available for review?** N\A at the time. **If not, please describe integration desires and capabilities.** Some systems leverage MS email for notifications and auto reply messages to citizens. We would like to know if this something currently available with the system you are offering?

10. **(Question) Please provide examples of the kind of surveys and frequency and the kind of emails and frequency, if you are expecting them to be sent and data to be captured in the CRM.** We anticipate short customer satisfaction surveys on a continuous basis and would like for the data to be captured in the CRM.

11. **(Question) Please clarify your expectation for the References section of this response. On page 7, the RFP asks for 2 references and on page 8, the RFP asks for 3 references.** Scrivener's error. We would like three customer references.

12. (Question) Would you consider relaxing your requirement limiting this response to 20 pages to allow a thorough response to all elements included in the Scope of Work, Proposal Contents, and Detailed Functional Requirements? Similar responses typically require 40-50 pages. Yes, we will relax the requirement to 50 pages.

13. **(Question) One of the requests from the team on page 4 is Multi-channel support. Can you explain in more detail what the team is looking for?** The thought behind this question was, does the system you are offering contain support features such as SMS/Chat/Email/Phone/ etc.

14. **(Question) The RFP references Leases, Loans and Grants, is there a need to integrate with a financial software or financial institution?** No, at this time we do not need this type of integration.