

QUESTIONS & ANSWERS

RFP for Customer Relationship Management Solution for Baldwin County Commission

1. Any users beyond the 8 listed?

Initially we anticipate only be 8 end users of the Dynamics CRM platform but the solution architecture should be scalable. The Baldwin County Commission will be acquiring any recommended license through our Microsoft Enterprise licensing agreement so responders should make recommendations as to license they believe will best serve the needs of our Service Center.

Knowledge documents must be able to be accessed by citizens via our website so recommend licensing needs for unknown number of citizens that may be searching our knowledgebase simultaneously.

If additional licensing is needed for 1 Systems Engineer, 1 Systems Analyst and 1 Systems Administrator to be trained and assist in creating workflows include recommendations in response.

2. Is there consideration for CRM Online?

Our Knowledge database should be available online for citizen searches and citizens should be able to submit general requests just as they currently do through a phone call or email into the Service Center. Service Center Representatives would receive, process, gather any information from back end departments and respond back to the citizen's request or question. Scope of this project would not include pushing any service requests, questions or comments directly to back end departments. Any online submissions would be filtered through the Service Center.

3. What work order systems do you own?

Lagan, Encore, BMC Track-It, BOSS

4. Do you have any detail around what data needs to be integrated? Is it two-way?

Scope of this project does not require any integration other than telephony integration with Unify OpenScape Contact Center. One of the deliverables is for the team selected to identify and recommend potential system integrations. (Item 3 - Bullets 6 and 8)

5. Training and support is request to be T&M, do you want the rest of the project T&M?

Request for Time and Material is for POST implementation support only.

(See 1.1 Last Sentence of Last Paragraph)

The implementer will also provide support training, and post-implementation support on a time and materials basis.

6. Are you interested in building a web portal to submit requests?

Discussion for roadmap but not a deliverable in scope of this RFP.

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7. Do you need licensing costs provided as part of the response?

No – what we are asking for is an implementation partner to provide guidance on licensing to fit our needs but we will be the ones purchasing the license.

(See 1.1 second paragraph)

The implementer must understand the existing use of scripting, knowledgebase and forms used in our Citizen Service Center and provide architectural direction in the purchase of server and client access license to best allow for ability in future years to have a fully integrated system with APIs between various work order management systems in all County Commission Departments, mobile apps, and on our website.

8. Do you need data migrated from another system? If so, what system and how much data?

No

9. Would you reconsider the need for the Guarantee/Performance Bond? If not are there any alternatives to this requirement, i.e. can we write a check for this amount to be held till completion? Would you reconsider the need for the Guarantee/Performance Bond? If not are there any alternatives to this requirement, i.e. can we write a check for this amount to be held till completion?

No will not reconsider the need for the Performance Bond. The County requires a Performance Bond on all software projects to insure that the project is completed per the specifications.

10. What are the deciding factors on using the money that is guaranteed in the bond? Are there firm performance measures that can be marked?

We hold the Performance Bond until project is successfully completed. Your bonding company will request status reports throughout the project. Once project is complete the County can release your bond.