Request for Qualifications (RFQ)
For Customer Relationship Management Software and Support

Questions and Answers

May 15, 2024

Question: Is SOC II certification a requirement for this response?

Answer: Yes, SOC II is a minimum vendor requirement for this response.

Question: Please confirm there is a prebid. If so, please provide information to join the prebid.

Answer: Yes, there is a pre-bid conference on Monday May 6, 2024 at 1:00 PM EST.

The conference will be held via zoom at:

https://us06web.zoom.us/j/82448713458?pwd=qvBzIoeYVxNLftaGBo0FDR4TYFaumO.1

Meeting ID: 824 4871 3458

Passcode: 540798

This information along with a timetable for our Procurement deadlines can all be found on our website at https://www.elcbroward.org/procurement

Question: How many individuals need licenses for each process? Do all 220 need back end access to the CRM? How many are handling the IT ticketing side or the customer service side?

Answer: Our backend support for our existing CRM are a handful of employees in the IT department, who do most of the maintaining. Our IT staff will reach out to the vendor if there are questions we can't resolve on our own. All 220 employees have seats in the CRM, which they use on a regular basis for day-to-day process, but they are not all back-end users. They are given access to parts of the CRM that are relevant to their jobs. Our customer service logs external client phone calls, in which we log and manage the workloads, problem solving, and frequently asked questions. We use the CRM for a wide variety of our business processes that range from administrative to supporting our program delivery. Additionally, we have users external to our organization as well. Some of our users are partner agencies that refer people to our organization for services. We also have 740 childcare providers and thousands of educators & families that we offer grant and training opportunities in which we use the CRM for them to sign up for, complete forms, and other automated processes.

Question: Are you open to receiving a list of native integrations?

Answer: Yes, we are open to all configuration and products you may offer.

Question: I didn't notice a demo on the timeline offered, when do you foresee yourself moving towards a potential demo?

Answer: During the interviews listed on the timeline, we would like to see the product demonstrated.

Question: For the environment, are there any compliances that need to be maintained?

Answer: Yes, we require a SOC II certification.

Question: Are you looking for a cloud environment or on premise?

Answer: We are looking for a cloud solution.

Question: Is recruitment tracking something that is done with your current CRM, or is that a separate tool from your CRM today?

Answer: It is something that we have automated with our current CRM process.

Question: What is the name of the current CRM you are using?

Answer: We currently use a CRM made by Webauthor, the name of the system is FlexSystem.

Question: **Are all the above processes carried out in the CRM today? If not, could you please share the tools used for each of those processes?**

Answer: Yes, everything is built into our CRM.

Question: What Tool is being used for event management today? Is the vendor of choice expected to integrate with the event management system currently used by ELC? If this functionality is expected natively in the CRM vendor would ELC be open to partnering with tools our marketplace

Answer: The ELC is not using a specific event management system at the moment. We would like to include this feature in the CRM. However, it does not need to be natively embedded in the CRM.

Question: Could you please help us understand the scope of integration with Hootsuite & Tweetdeck

Answer: We are looking to use an API to retrieve data from Hootsuite and/or TweetDeck.

Question: From the IT ticketing side, is it ONLY ticketing/request being handled or are you looking to incorporate other ITIL processes like, Change Management, Asset Management, Major Incident Management etc, Problem Management etc.

Answer: Yes, we are looking to incorporate Asset Management

Question: Please expand more on the project management needs. How do you define projects? How many folks are working on projects?

Answer: Our projects vary depending on the program and can include several different staff members for each project.

Question: Where are assets stored today? Do you have an asset discovery solution, or are they stored in excel sheets?

Answer: Assets are stored in our online module, which provides visibility into all assets within the organization.

Question: Is the Equipment assignment and disposition tracking for internal employees or for the customers you are servicing? Can you expand on how this process works today?

Answer: We are simply looking for a module to track who has which equipment and when it is disposed of.

Question: How many people will you want to be working on a projects?

Answer: This can range from about 3-7 different staff members depending on how many projects we'll have throughout the fiscal year.

Question: How many people do you have as customer service agents who are actively handling case's/ticketing for your external customers?

Answer: We don't have any customer service agents that handle ticketing for external customers.

Question: What phone system are you using today - is this the system you want integrated into the CRM? Or are you looking for a phone system? If so, how many folks do you need to have access to phones?

Answer: We are currently using LinkLive VOIP, but we are not looking to integrate it with the CRM at this time as we are getting ready to procure for a new phone system through a separate RFP.

Question: What is the current CRM you are using?

Answer: We are currently using FlexSystem, by the Vendor Webauthor.

Question: **How often are the following groups using the system: Child Care Providers, families, Partners? Is it more than 3 times a week for any of these groups?**

Answer: Providers and families utilize our system for trainings and grants that we offer which require them to enter in their information, so they use our system more than 3 times a week. Our Partners use our system to enter in referrals and this might be less than 3 times a week.

Question: How many Coalition systems are you working with? What are the different systems being used by coalition members?

Answer: We are currently working with about 3-4 different systems, such as EFS Mod for our child data tracking, WELS FL system for Coalition data collection and Resource and Referral, and our Current CRM FlexSystem for project management, Contract Administration, HR Management, and etc…

Question: Do you have a current telephony provider you want to bring into the system?

Answer: Not at this time.

Question: Will the Coalition accept a range for implementation cost given that we will need to provide more insight into the requirements to provide a fixed cost?

Answer: We ask that you offer us your best price for all associated costs for your product.

Question: We do need to know the number of IT people who would be handling IT tickets and assets. This is a separate tool for us than CRM and we need an exact number to be able to provide pricing. This would be anyone who would want/need access. So your IT agents, managers, application managers etc..

Answer: We have about 4-5 IT staff that handle ticket requests.

Question: Just a clarification question on the timetable. We see the interviews commence 2 days after the RFP is due. If we are selected for the demo phase, we would need some notice in order to build a demo for you based on your use cases. We'd request 1 week. If you are open to it, we would like to do a deep dive discovery first (1 hour session) prior to the demo, so we can truly understand your processes and put our best foot forward to give you a realistic view of what working in our CRM would look like. Is this possible?

Answer: As this a is a formal procurement, there are statutes in place that require this to be a fair and open process. We can't allow extra timing for our rating committee to meet with you without doing the same for other vendors. As of right now our timeline is set to allow time for the rating committee to score the proposals and bring the decision before the board. We want to see product as it already exists, and if you want to discuss enhancements, you can but we would not want you to spend time building anything for this stage of the process. Demos are only about 20 minutes including a brief overview of your services and time for the Rating committee to ask questions regarding your product.

Question: If you don't have customer service agents, or folks who are taking customer service calls, can you give some insights into what "Customer service call tracking and analytics: are defined as?

Answer: To be clear on that, we do have about 16-18 call center staff who handle calls with our families. They don't handle ticketing, but we do track certain analytics i.e their call time, the length of time someone may be on hold, amounts of calls received by the different staff, etc..