

Q&A

RFI-2024-004R

Customer Relations Management Services

1. Ask if how many users **GRAND** River Dam Authority needs for this CRM system?
 - Internally 10 – 15 users should take care of it but would like to make sure increasing that number will be an option if needed. External users not known.
2. How many users needs to be considered for pricing?
 - Internally, 10-15 users with the ability to add more if needed. External users not known.
3. Do you have any budget requirements?
 - Not at this time, RFI just to get a budgetary estimate before doing a formal RFP.
4. Are there any specific integration requirements with existing GRDA systems other than Microsoft outlook and teams?
 - MS Word & MS Excel
5. How many users does GRDA anticipate will need access to the CRM system?
 - Internally 10 – 15 users should take care of it but would like to make sure increasing that number will be an option if needed. External users not known.
6. Does GRDA have a preference for on-premises or cloud-based (SaaS) solutions?
 - We do not have a preference at this time.
7. Can you elaborate on the types of automation functions GRDA is interested in?
 - Task management and collaboration;
8. Can you provide more details on the different types of customer contact lists GRDA needs to manage (e.g., Municipal Leadership, Utility personnel)?
 - The GRDA External Relations Department maintains relationships with GRDA customers at multiple levels in their organizations. We would like the ability to collect, categorize, and manage this information based on level of need and interaction to enhance communication.
9. How does GRDA currently manage multiple contact lists for different customer types (e.g., Municipal Leadership, Utility personnel)?
 - GRDA currently has its own home-grown, in-house database it uses to store customer information.
10. Could you elaborate on the crisis communication scenarios GRDA envisions?
 - To communicate immediately, for example, with customers during a Southwest Power Pool (SPP) Grid Advisory that could impact their end-use customers.
11. What types of marketing campaigns does GRDA currently run or plan to implement?
 - TBD
12. What specific features does GRDA envision for the interactive customer portal?
 - The ability to download informational resources such as seasonal and topical sheets for end-use customers.
13. What are GRDA's specific requirements for file storage within the CRM?
 - We would like the vendor to provide an overview of what their file storage capabilities are.
14. Can you describe the typical customer journey or lifecycle that GRDA manages?
 - Establishing and maintaining our current customer relationships. We do not have an actual lifecycle/sales lifecycle that we manage to.

15. How does GRDA currently handle customer service cases or inquiries?
 - GRDA currently has its own home-grown, in-house database it uses to store customer information.
16. What is GRDA's current SSO implementation?
 - We use SAML via Microsoft Entra as our authentication platform
17. Are there specific SSO protocols that need to be supported?
 - We would like to stick with using SAML with Microsoft's Entra
18. As GRDA grows, how important is the ability to easily scale your CRM solution?
 - Responsive software will help meet these demands.
19. What functionalities are critical for the mobile app?
 - A robust mobile application is critical for the overall success of the software since emergency messages may need to be sent during out of office hours.
20. Who are the primary users of the mobile app (field personnel, management, etc.)?
 - Upper-level management.
21. How important is it for GRDA to have a 360-degree view of customer interactions across different departments?
 - Marginal