



Request for Information (RFI)

Statement of Work

Customer Relations Management Software

RFI-2024-004

July 26, 2024

Submit Responses To: Stephanie Waits

Phone: 918.960-2221

E-mail: stephanie.waits@grda.com

NOTE: If Respondent has any questions pertaining to the enclosed RFI, direct them to the Buyer as listed above. Only answers provided by the GRDA Central Purchasing Unit will be considered official and valid by GRDA.

A.1. Background

The Grand River Dam Authority (the "Authority" or "GRDA") was created in 1935 as a non-appropriated conservation and reclamation district by the State of Oklahoma. GRDA has the power to control, store, preserve, and distribute the waters of the Grand River and its tributaries for any useful purpose, to develop and generate water power, electric power and electric energy within the boundaries of the Authority, and to buy, sell resell, interchange, and distribute electric power and energy.

Using the trend analysis, GREC plans to extend equipment life and increase production capacity and prevent possible maintenance issues.

A.2. Purpose of Intent

The GRDA Wholesale Customer Relations Team (WCRT) is issuing an RFI for Customer Relationship Software (CRM) where the main focus will be to manage customer relationships, individual and group interactions with team members internally and GRDA customers externally. Ideally, the CRM software will deliver a robust platform that includes, but not limited to, the features listed in the Technical Requirements section.

A.3. Vendor and Staff Requirements

The vendor must:

- Have a proven and demonstrable record of designing, supplying, installing and configuring industrial data storage and management systems. The ideal vendor will have implemented this solution for a utility with a similar profile to GRDA's.
- Provide three (3) references for previous projects performed with contact information
- Provide evidence of an established United States based support team

The vendor should:

- Provide track record of product history
- Provide a detailed roadmap for future product development
- Describe new software release process

A.4. Technical Requirements

Goods

- Manage Customer Contact information
 - Including multiple contact lists, for example
 - **City/Customer Community**
 - Municipal Leadership
 - Board or Council
 - Mayor
 - **Utility**
 - General Manager
 - Financial
 - Accounts Receivable & Accounts Payable
 - Utility Field Personnel
 - Customer Service Representatives
 - **Chamber of Commerce**
 - **Education**
- Built-In phone dialer giving ability to text and call from the CRM to instantly communicate with customers
 - Ex: Quick communication to customers during a crisis situation
- Interactive customer portal to include the ability to load various files/information directly to the customer's account

- Ex: Seasonal information sheets, special topics, videos, other printable material
- Organize and share data across team
 - Ex: Members of GRDA departments would be able to see/share information on customers but also have security permissions setup based on different hierarchy within GRDA. (CSRs would not be able to see information that higher-level management could see).
- File Storage
- Mobile App
- Ability to create forums
- Messaging Capability to disseminate information to customers quickly

A.5. Project Activity and Management

The vendor will supply a Project Manager as the point of contact to coordinate with GRDA's Project Manager to monitor timetable and deliverables for completion specified in the RFI. It will be the goal of the vendor project manager to keep within the contracted cost. It will be the goal of both project managers to keep the project within the scope of the work outlined in the Statement of Work.

Vendor's Project Manager shall develop with GRDA's Project Manager a project schedule at the beginning of the project. Any changes must be agreed upon by the vendor and GRDA before they are incorporated into the plan.

The vendor shall coordinate all technical and functional work efforts, including training sessions with GRDA Project Manager.

The vendor must schedule and attend all meetings during normal business hours, which are Monday – Thursday, 7:30 – 4:30 PM Central Time.

Change Control Process

Vendor shall establish standard project scope change process and necessary documents (i.e. Change Request form). Any changes to the project scope will be managed by the vendor's Project Manager and shall require GRDA's review and approval prior to being implemented.

All parties must sign the approval portion of the Change Request form to authorize the implementation of any change that affects the Project's scope, schedule or price. Furthermore, any such changes that affect the scope of this RFI, schedule or price will require that an amendment to the Statement of Work be executed between the parties.

Vendor shall respond in writing to a Change Request within ten (10) business days of receipt of the request to include a quote for the work required to complete the change, stating the estimated number of hours of effort, an estimate delivery date, and details of the technical approach for the proposed change and the period of validity of the quote ("Change Quote")

GRDA shall respond within ten (10) business days from receipt of a Change Quote, unless additional approval time is required due to GRDA's statutory requirements. This may be either approval (for the analysis or development to proceed), cancellation or notification that further time shall be required by GRDA to consider the quote.

On receipt of a duly signed change order, vendor shall supply the services that are the subject of the request, and such services shall be deemed services in accordance with this schedule.

A.6. Available Technology Resources, Data Migration, and Integration Points

- Vendor shall identify and mobilize the appropriate resources with the necessary skillsets to meet the requirements.
- Vendor shall appoint a Project Manager as the point of contact who will be responsible for understanding the requirements, acquiring the appropriate resources with necessary qualifications, monitoring the status and quality of the Deliverables and administering the project.
- GRDA shall provide a Project Manager, System Owner and dedicated project team that shall consist of subject matter experts with the authority to resolve any issues throughout the project.
- GRDA shall provide hardware environment. The infrastructure, application and database must be tested by the vendor with validation from GRDA and fully functional prior to the commencement of services.
- The Technology resources at GREC will have a pre-defined list of devices and parameters to be collected and placed into the data historian

A.7. Support, Training and Maintenance

- The vendor must warrant that the system will function as designed and detailed in the final sales agreement and in the supplied documentation for a period of twelve (12) months after installation and GRDA acceptance
- The vendor must demonstrate the ability to supply long term technical support (greater than ten years) along with the cost of the technical support

- The vendor must supply the cost of maintenance for the system
- The vendor must supply training of the system including administration, configuring data system, client software including reporting, analysis, and calculations
- Must detail in proposal the training format, duration and content

A.8. Deliverables

- Software licenses
- Implementation of software per requirements within Statement of Work
- Report/Dashboards - allowing users to quickly establish basic trends relative to asset reliability and plant performance
- Complete operation and maintenance documentation

A.9. Inspection and Acceptance

Final System Acceptance will occur after all terms and conditions of the contract negotiated with the Contractor have been successfully completed, all testing has been successfully completed and the System has operated in a live environment. In the event of non-compliance, contractor is to correct the System in conformity with the requirements of the RFP, at no additional increase in total contract amount.

A.10 Response Requirements

- Pricing

Indicative pricing, or a rough estimate, only is requested for budgetary purposes.

*****PLEASE DO NOT PROVIDE A FORMAL QUOTE OR PROPOSAL FOR THIS RFI*****

- Site Visit

No site visit is required at this time.

- Demos

GRDA may elect to hold demonstrations with one or more vendors and any costs associated with providing the demonstrations are at the expense of the vendor.

A.11 Submission of Information

Written responses must be submitted no later than **August 9, 2024 at 5:00 PM CT.**

Responses to this RFI must be submitted via email to the following:

Stephanie Waits

Email: stephanie.waits@grda.com

Preparation and submittal of a response shall be at the expense of the vendor and at no cost to GRDA.

Any questions pertaining to this RFI must be sent in writing to Stephanie Waits at stephanie.waits@grda.com by no later than **August 5, 2024 at 5:00 PM CT.** Only answers provided by the GRDA Central Purchasing Unit will be considered official and valid by GRDA.

A.12 Outcome

The Grand River Dam Authority does not guarantee any formal solicitation will be generated based on this RFI.