



**Request for Information (RFI)**

**RFI-2024-004R**

**(Replacement of earlier version posted on 7/26/24)**

**Customer Relations Management Software**

**8/1/2024**

**Submit Responses To: Stephanie Waits**

**Phone: 918.960-2221**

**E-mail: [stephanie.waits@grda.com](mailto: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.**

# **NOTICES/INSTRUCTIONS**

## **1.1 INTRODUCTION**

This request is for information only to assist the Grand River Dam Authority in determining the best software solution for its Wholesale Customer Relations Team to manage customer relationships, individual and group interactions with team members internally and GRDA customers externally.

## **1.2 PURPOSE**

This Request for Information (RFI) is to solicit technical and performance narratives along with suggested pricing information from vendors and identify additional supply or product resources for Customer Relationship Software (CRM) where the 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 Requirements section.

## **1.3 REQUIREMENTS**

- Robust support for Customer Information Records and relationships within customer organizations
  - 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
- Robust ability to track interactions with customers and perspective customers
  - Must be able to easily and quickly search past interactions
  - Provide overview of lead management functions
- Messaging Capability to disseminate information to customers quickly
  - Ability to text and call from the CRM to instantly communicate with customers
    - Ex: Quick communication to customers during a crisis situation
  - Enumerate all communications options
- Provide overview of automation functions

- Ex. Marketing campaigns
  - Highlight and discuss any metric tracking reports/dashboards associated with automation activities
- 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 Support
- Ability to create forums
- Out of the box reporting
- Technical
  - Brief overview of CRM system architecture (Ex. On-premises vs Software-as-a-Service)
  - Overview of solution cyber-security practices
    - Provide SOC type 1 and or 2 as applicable
    - Provide additional cyber related information as deemed necessary
  - Integration with Microsoft End-User Products – specifically Outlook and/or Teams for seamless communications
  - Support for Single Sign-on Support
  - Overview of system security model and support for role based access permissions

#### 1.4 **CURRENT CIRCUMSTANCE/SITUATION**

GRDA currently has its own home-grown, in-house database it uses to store customer information and report from. The objective of this request is to find a software solution that will be used to find a more productive method of contacting customers to inform them of changes that could impact them as well as a way for the customers to interact more effectively with GRDA.

#### 1.5 **RESPONSE REQUIREMENTS**

Please keep your response to 10 pages or less. RFI responses should contain the following:

- Contact Information
  - Please provide the following contact information:
    - Company Name
    - Address
    - Name of the individual who will act as primary point of contact for inquiries
    - Contact Person's Telephone Number
    - Contact Person's Email Address

- Comments
  - Please provide your evaluative comments on the project description and requirements outlined in this document. Include any suggestions or advice regarding the design, implementation, management, technology, etc. of this issue. Detail what additional information or clarifications would be needed in order to prepare a comprehensive proposal in the future. Please include with your response your past work history and years of experience on projects of a similar scope.
  
- Approach
  - Based on the project information provided to date, briefly describe the approach you would recommend for this project and why.
  
- Remote Product Demonstration
  - GRDA may request a product demonstration to evaluate the recommended solution.
  
- 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.

## 1.6 **SUBMISSION OF INFORMATION**

Written responses must be submitted no later than **August 21, 2024 at 5:00 PM CT.**

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

Stephanie Waits  
 9933 E 16<sup>th</sup> St  
 Tulsa, OK 74128  
 Email: [stephanie.waits@grda.com](mailto: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](mailto:stephanie.waits@grda.com) by no later than **August 14, 2024 at 5:00 PM CT.**

Only answers provided by the GRDA Central Purchasing Unit will be considered official and valid by GRDA.

## 1.7 **OUTCOME**

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