

# **REQUEST FOR PROPOSALS**

**FOR**

## **CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM**

**Issued by the St. Louis Economic Development Partnership**

**Proposals Due By:**

**Friday, September 15, 2017, at 3:00 PM  
St. Louis Economic Development Partnership  
ATTN: Dustin Allison, General Counsel  
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## **Introduction**

The St. Louis Economic Development Partnership (the “Partnership”) is a not-for-profit economic development organization responsible for creating high quality business and employment opportunities and enhancing the quality of life to advance long-term diversified growth throughout St. Louis County, the City of St. Louis, and the St. Louis Region. As part of its efforts, the Partnership provides staff and support to various affiliated entities. For a brief description of each entity and a basic list of their needs, please refer to Exhibit A.

The Partnership’s various divisions collect and maintain a significant amount of contact information from vendors, contractors, business owners, corporations, government agencies, and other groups and individuals. Additionally, the divisions document numerous communications, notes, and activities associated with these contacts. The divisions manage opportunities in many different stages of the sales pipeline as well as grants awarded to and managed by us. Without a comprehensive, unified, and fully-integrated customer relationship management solution (the “CRM Solution”), there is no effective way to maintain an accurate, up-to-date database of contacts, activities, opportunities, grants, or comments on these items. Furthermore, the data is not easily shared among the divisions or even among individuals within the same division. The information is very dynamic and requires a user-friendly way to collect, update, manage and share all the data among the various personnel and divisions.

The Partnership issues this Request for Proposals (“RFP”) for a contractor to develop a CRM Solution to maintain and expand its contact and opportunity database within a system that can be shared amongst multiple users.

## **Objective**

The Partnership seeks a comprehensive CRM Solution to meet its needs of maintaining and expanding its contact and opportunity database within a user-friendly system that will be shared among approximately 70 individuals. The data will include group, contact, activity, opportunity, and grant information, a small percentage of which is confidential.

The CRM Solution must be able to provide a uniform system that can be easily accessed, updated, and shared by approximately 70 users in the various divisions of the Partnership. The CRM Solution must also have the ability to import legacy data currently stored in excel spreadsheets, access databases, and outlook used by the Partnership’s divisions into the new, unified structure.

The CRM Solution must not be proprietary to an implementation vendor. The Partnership must have the ability to leave the chosen vendor without having to re-implement a new solution. This is a protection necessary for the possibility of the vendor going out of business or a breach of contract. (Solutions such as Salesforce or Dynamics 365 are not considered proprietary as many vendors provide implementation and ongoing services for these platforms. A solution built on the force.com platform or similar and unique to that vendor would be considered proprietary.)

The CRM Solution must have the ability to accommodate potential future enhancements and integrate with other services as needed. These must be possible without having to re-implement, re-architect the entire solution, modify the base code, or create a legacy system that must be actively maintained. For a full list of potential future enhancements and integrations, refer to Exhibit B.

### **Scope of Services**

The Partnership seeks to engage a contractor to provide the CRM Solution as described in more detail below (the "Project"). The Partnership requests proposals which address the objectives listed above, and specific requirements of the desired CRM Solution which may include, but are not limited to, the following:

1. A cloud solution to maintain and develop contacts, activities, opportunities, and grants by the Partnership's various divisions, with approximately 70 users.
2. System tools for collaboration, data sharing, and communication among the individual users and divisions.
3. Reporting and analytic capabilities to provide leadership with quantitative data related to internal and external output. The ability to create reports must be available to general users (with some training required) rather than requiring a complex request process and lead time for custom reports.
4. Integration into existing communications tools such as outlook as well as in-platform communication tools.
5. Full access to mobile and cloud-based devices across multiple platforms (e.g., iOS/Android mobile devices and Windows PC).
6. Initial training for all Partnership users and creation of training materials to be used as reference and for training of new personnel.
7. Consultation on methods of data unification and streamlining, both at the initial implementation and ongoing customer and technical support.
8. Service and troubleshooting for technical issues and barriers that prevent effective CRM Solution operation and use.
9. Import of existing data found in excel spreadsheets, an access database, and outlook.

Implementation and support services will begin no later than January 2, 2018, and be provided at the Partnership's offices at 7733 Forsyth Blvd., Suites 2200, St. Louis, MO 63105, and at 120 S. Central Ave., Suite 1200, St. Louis, MO 63105.

### **Proposal Content & Format**

Proposals must include, at minimum, the following information:

1. Experience and History of Company. Provide a discussion of the firm's overall qualifications and experience in providing similar services. Specifically, experience implementing CRM for other economic development agencies. The candidate shall demonstrate that it possesses the experience necessary to successfully provide the CRM Solution required by this RFP and the ability to work in a responsive and cooperative manner with the Partnership staff. Please include:
  - a. A description of the firm's proposed approach for providing the proposed CRM Solution. This section should include a detailed breakdown and description of the specific steps that will be followed to perform the Scope of Services listed above. Candidates may elect to include in this section any innovative methods or concepts that might be beneficial to the Partnership as long as the requirements established in this RFP are met.
  - b. The candidate shall also include an estimate, in hours, for each service to be provided.
  - c. References of organizations that have worked with the firm in a professional consulting capacity within the last five (5) years. Each reference must include the organization's name, mailing address, contact name, contact telephone, email information, and the specific service(s) provided by the candidate. Ideal references will be in a similar industry, geography, and have a similar size: Economic Development, Midwest/Central US, 50-150 end users.
  - d. List of the largest competitors and markets served by the firm.
2. Cloud Solution. Describe the available cloud solution options and briefly explain advantages of each as pertaining to the Partnership's stated objectives. Please include:
  - a. The scalability of the solution and ability to support a wide range of clients.
  - b. The duration of the license agreements, renewal terms, if applicable, and whether such license would be singular to the Partnership, to each division, or to each individual user.
  - c. Product lifecycle and a description of staffing dedicated to keeping the most current version of the cloud solution.
  - d. Description of the cloud based solution's security and SLAs, including standards for data backup and recovery.
  - e. Availability and ease of implementation for future enhancements and integrations as listed in Exhibit B.

3. Support Services. Describe the available support services, including installation, initial training for approximately 70 users, ongoing training for system upgrades and new users, maintenance and trouble-shooting.
4. Cost. Clearly state all fees and expenses, including any fees or expenses to third-party licensors or contractors, to be charged for available cloud options, design, implementation, staff, and support services as well as what options are included in any fee packages.
5. Supplemental Services. Any other related and recommended products or services not specified in this RFP which may be considered when deemed in the best interest of the Partnership.

### **Selection Criteria**

Proposals submitted will be reviewed for completeness and qualifications. Selection of a firm will be made on the basis of the following criteria in descending order of importance:

1. Qualifications, expertise, experience, reliability and history of the firm in providing services similar to the Objective and Scope of Services as described in this RFP.
2. Ability to fulfill the needs outlined in both the Objective and Scope of Services, including current and future functionality of the CRM Solution.
3. Understanding of the Objective and Scope of Services as outlined in this RFP, including how the unique conditions of economic development in the St. Louis region affect the proposed Project methodology.
4. Project cost, estimated time, and workforce commitment.
5. Responsiveness of the firm to the RFP categories.

The St. Louis Economic Development Partnership encourages submission of proposals from disadvantaged business enterprises and companies owned by minorities, women, immigrants, and veterans. The Partnership does not discriminate on the basis of race, color, religion, creed, sex, sexual orientation, gender identity, age, ancestry, national origin, disability, or veteran status in consideration of this award. Equal Opportunity.

### **Terms and Conditions**

The following terms and conditions apply to all proposals:

1. The Partnership reserves the right to reject any and all proposals submitted; to select one or more responding parties; to void this RFP and the review process and/or terminate negotiations at any time; to select separate responding parties for various components of

the scope of services; to select a final party/parties from among the proposals received in response to this RFP. Additionally, any and all RFP project elements, requirements and schedules are subject to change and modification. The Partnership also reserves the unqualified right to modify, suspend, or terminate at its sole discretion any and all aspects of this RFP process, to obtain further information from any and all responding parties, and to waive any defects as to form or content of the RFP or any responses by any party.

2. This RFP does not commit the Partnership to award a contract, to defray any costs incurred in the preparation of a response to this RFP, or contract for any services. All submitted responses to this RFP become the property of the Partnership as public records. All proposals may be subject to public review, on request, unless exempted as discussed elsewhere in this RFP.
3. By accepting this RFP and/or submitting a proposal in response thereto, each responding party agrees for itself, its successors and assigns, to hold the Partnership and its affiliated entities, St. Louis County, the City of St. Louis, and all of their various agents, commissioners, directors, consultants, attorneys, officers and employees harmless from and against any and all claims and demands of whatever nature or type, which any such responding company, its representatives, agents, contractors, successors or assigns may have against any of them as a result of issuing this RFP, revising this RFP, conducting the selection process and subsequent negotiations, making a final recommendation, selecting a responding party/parties or negotiating or executing an agreement incorporating the commitments of the selected responding party.
4. By submitting responses, each responding party acknowledges having read this RFP in its entirety and agrees to all terms and conditions set out in this RFP.
5. Responses shall be open and valid for a period of ninety (90) days from the due date of this RFP.

### **Submission of Proposals**

**To be considered, proposals must be received no later than Friday, September 15, 2017, at 3:00 PM.**

Electronic proposals should be sent by email to [dallison@stlpartnership.com](mailto:dallison@stlpartnership.com).

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**Exhibit A**

Division Name	Entity Type	Description	# of Users	Needs Short List	Security Concerns
St. Louis Economic Development Partnership (SLEDP)	501(c)4	Non-Profit created with the goal of improving the St. Louis economy by retaining and growing existing business, attracting new businesses, and nourishing start-ups.	12	Contacts Accounts Tasks Events Outlook Integration	
Business Development	Falls under SLEDP	Provides tax incentives for companies bringing jobs to the St. Louis area both through bringing new business and expanding existing businesses. Also manages an entity which manages new market tax credits awarded by the federal government.	9	Contacts Accounts Tasks Opportunities Outlook Integration	Some of the opportunities for this division are highly confidential and often we won't even have an actual customer name at the start. Need some way to denote these instances and secured them appropriately
Real Estate	Falls under SLEDP	Provides real estate services to the other divisions of the partnership such as coordinating new construction and renovation, managing buildings, and any other real estate needs. Also manages highly confidential grants for the Port Authority.	7	Contacts Accounts Tasks Grant Management Outlook Integration	

Marketing	Falls under SLEDP	Provides marketing services to the other divisions such as managing social media, getting leads and clients to events. Also creates press releases for the announcements regularly coming out of the different parts of the partnership and communicates to press contacts.	4	Contacts Accounts Tasks Leads Campaigns Events	
Accounting	Falls under SLEDP	Provides traditional accounting services to the other divisions of the partnership. Generates financial reporting to fulfill the requirements of various grants for almost all divisions.	7	Contacts Accounts Tasks Grant Management	
Advanced Manufacturing	Falls under SLEDP	St. Louis area manufacturing is heavily dependent on defense spending. Because of this, Advanced manufacturing was created through a federal grant as a temporary project to determine how to best offset the economic burden that would be created with a reduction in defense spending.	2	Contacts Accounts Grant Management	
Strategic Initiatives	Falls under SLEDP	The "R&D" of the partnership. Determines places to create or expand demand for development and then hands off to another group once started.	1	Contacts Accounts Tasks Events Grant Management Outlook Integration	
Promise Zone	Falls under SLEDP	Manages the promise zone project which is a federally chartered project to change the direction of the most distressed communities through consultation with subject matter experts and community level engagement.	3	Contacts Accounts Tasks Events Outlook Integration Grant Management	

Major Projects	Falls under SLEDP	Division focused on coordinating the efforts for major Partnership projects in the St. Louis area. Examples include a new innovation district, a large ice center, and a new soccer park.	2	Contacts Accounts Tasks Events Outlook Integration Grant Management	
World Trade Center-St. Louis (WTC)	501(c)3	Provides events and services to persons and companies with memberships including networking events, invitations to meet with international contacts, private portal to connect with other members, and market research completed by WTC staff. There are also other events open to the general public and members receive a discount.	7	Contacts Accounts Tasks Events Campaigns Outlook Integration	
Mosaic Project	Falls under WTC	A regional initiative to influence economic growth by supporting immigrant entrepreneurs. Manages an ambassador program which helps build a more welcoming and inclusive community. Also manages a professional connector program which is a mentorship program to help immigrants grow their professional network.	3	Contacts Accounts Tasks Events Outlook Integration	
Midwest Cargo Hub Commission	Falls under WTC	Talk to Sean and Tim about this	Counted in other groups	Contacts Accounts Opportunities	
Business Finance	501(c)6	Writes and services loans through the SBA 504 program for companies in the St. Louis area. Loans are primarily written for prospects who are referred to us through bankers we have a relationship with.	8	Contacts Accounts Tasks Outlook Integration	

STL VentureWorks (Referred to internally as Innovation & Entrepreneurship or I & E)	501(c)3	Manages incubators for growing companies in the St. Louis area. Hosts events to highlight the work being done in the incubators and grow their network. Manages grants for the incubators.		9 Contacts Accounts Tasks Events Grant Management Outlook Integration	Would be fine with other divisions seeing the information about the start-ups in the incubators, but would like to restrict the ability the ability to edit if possible.
EB5 (Gateway to the Midwest Investment Center)	501(c)3	Acts as an intermediary between business developers in the St. Louis area and foreign investors. Manages interested parties from both groups and connects them for the right opportunities.	Counted in other groups	Contacts Accounts Tasks Opportunities Outlook Integration	

## **Exhibit B**

The below list represents future enhancements and integrations that have currently been thought of but are not an exhaustive list. The purpose of providing this list is not to request a guarantee of feasibility for enhancements or integrations, but rather to ensure that the proposed solution can be expanded upon and/or has an existing list of integrations and enhancements readily available

List of potential future enhancements and integrations:

- Integration with Abila MIP
- Integration with DocuSign
- Marketing automation including mail merge, response tracking, and event management
- Integration with existing incubator management solution or build out of necessary functions
- Automated workflows
- Human Capital Management
- Project Management
- Microsoft Office and Office 365
- Website integration with regards to event registration and online forms