AIU Customer Relationship Management System RFP Vendor Questions & Answers

Q. We are looking to understand how simple or complex the pricing side is for your contracts. Can you please describe your services fee model?

A. Annually we produce a Services Guide which outlines all of the standard services that each program offers. The fees may be listed as rates per day, rates per hour, etc. We anticipate that the services guide will be part of our onboarding for the CRM product and we will be bringing in those types of costs.

Q. What is the budget for the CRM project?

A. The project will be budgeted, however we do not have a firm number right now.

Q. Knowing you would like to start with a small number of programs first, do you have any programs in mind that you would like to start with?

A. There are a handful of programs within our Teaching and Learning division which probably has the greatest number of external contacts. Next would be our internal services division which also includes several programs which have external contacts throughout the county as well as the Commonwealth of Pennsylvania. We don't want to start too small or start to big and we feel these divisions should give us the right focus to start with.

Q. Can you elaborate of the process of leads-to-quoting-to-contract?

A. We currently do not have a standardized process with leads-to-quoting-to-contract, so our efforts are to bring an electronic, agency-wide solution.

Q. Do your contracts/quotes have upfront payments or a 'managed services' type of retainer or do the contracts/quotes just summarize what your rates are, and then you bill monthly, quarterly, as you go, etc.?

A. For the most part, we bill monthly. For our longer-term contracts, some are an upfront payment for net 30 or 60 days.

Q. Can you share some sample versions of quotes your teams have sent out before? Even if it's scrubbed, seeing a sample of how you configure quotes/contracts would be beneficial.

A. Sample Quote 1, Sample Quote 2, Sample Quote 3

Q. Are hard copies necessary in addition to the email response?

A. Yes.

Q. Can you provide more detail around the level of access for the various staff members? For example, how many will need full read/write access versus read-only? Also, how many are external versus internal personas?

A. All users will be internal. **Approximate** numbers for the various levels of access are as follows:

- Read/Write: 120
- Read-Only: 250
- Dashboard Only: 100

Q. The RFP lists a number of different roles in the organization that would be using the CRM. Can you clarify the use case for each of these roles?

A. Program directors and administrative assistants are going to likely be the people who are going to have the most interaction with our customers and will need to have read/write access as well as generating quotes. Program staff perform the services, will need access to see contact information, but not generate quotes.

Q. With a multi-phase approach, what are the priorities for phase one?

A. Single sign-on, lead-to-quote-to-contract, and integration with Microsoft Office (especially email).

Q. Should there be integration between the CRM and your billing system (Oracle Fusion)?

A. We are not looking for integration into Oracle right out of the gate in phase one. We want to make sure we know what's possible so that we can make an informed decision about how we might implement taking an invoice from the CRM to our instance of Oracle Fusion.

Q. Can you elaborate of what types of documents the CRM will be storing? What is their purpose?

A. We want to store quotes and contracts. There may be other types of documents that could be determined at a later date or during the discovery process of the project.

Q. Should documents have a revision history for you to track? Would documents change regularly?

A. Many of our documents (that would be stored in the CRM) are updated annually, however that's not to say that some documents may be updated more than once a year.

Q. Would you prefer that we train the team for the first iteration, or would you prefer a Train the Trainer approach?

A. We are looking to build some level of expertise to be able to support and manage the product on our own. It is fair to say that we do not have a depth of knowledge on how to operate and run a CRM, so it should be assumed that our team will need some high level of training, but then understanding how to train our end users down the road. If there's an option for remote training that's customized based on the solution being developed, we'd like to see options on what that looks like for both in person and remote training.