

# CITY OF WEST HOLLYWOOD

## REQUEST FOR PROPOSALS

### CUSTOMER RELATIONSHIP MANAGEMENT

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NOTICE IS HEREBY GIVEN that the City of West Hollywood invites Requests for Proposals for the services stated below and will only receive such proposals no later than **3:00 PM Friday, March 15, 2019**. All proposals should be submitted electronically to Brant Birkeland, Business Development Analyst ([bbirkeland@weho.org](mailto:bbirkeland@weho.org)).

The City of West Hollywood is seeking a multi-year contract with a qualified and highly motivated vendor to create an Economic Development-focused customer relationship management (CRM) software solution. The tool will initially be used by the City's two-person Business Development Division to track and manage client communications and interactions, track assistance provided to existing and potential businesses, manage the business retention and expansion program (including coordinating visits and follow up communications), and tracking prospects and active development projects. The City is offering an Agreement with an ending date of June 30, 2023, with an option to renew for an additional two (2) years. Any renewal will be granted at the sole discretion of the City and subject to the same terms and conditions of the original contract.

Please note that no oral, telephonic, or telegraphic responses or modifications of responses will be considered. Proposals received within the prescribed deadline become the property of the City and all rights to the content therein become those of the City. This Request for Proposals does not commit the City to award a Contract, to pay any costs incurred in the preparation of a response to this request, or to procure contracted services. The City reserves the right to accept or reject any or all responses received as a result of this request if it is in the best interest of the City to do so.

The CRM should be able to provide at a minimum the following:

1. A business retention module to track BRE visits, feedback and activity
2. Reporting capabilities, including exporting reports to Excel
3. A customizable dashboard to track top tasks and activity
4. Tracking of City goals in the CRM
5. The ability to easily and quickly update and modify fields, forms and views in all modules
6. Modules pre-designed to track and catalog incentives as well as sites/commercial locations
7. A smart phone app that allows users to access contact, company and project information on the fly
8. The ability to integration with Microsoft Outlook so that it is easy to create new records on the fly from Outlook, including leads, contacts and accounts and also to track email communication from Outlook to records in CRM as well as a web interface tool that can send emails from Dynamics using the Outlook account
9. Marketing list tools that allow for the creation of dynamic as well as static marketing lists that integrate with the e-mail marketing solutions
10. The ability to integrate with e-mail marketing solutions and track activity back to the CRM database in an affordable manner

11. A demonstrated client list of local government (city, county, districts) economic-development specific deployments

The Proposal should include:

- A. **Cover Letter** stating the vendor's ability to provide a CRM system that meets the minimum requirements listed above and includes the vendor name, website, physical address and telephone number along with the Respondent's contact name, telephone number and email address.
- B. **Vendor Qualifications** including the number of years you have been in business, at least 3 customer references, and list of local government economic-development specific customers.
- C. **CRM Information** including any brochures or links to product demonstration sites that show that the minimum requirements listed above can be met and include the minimum hardware/software/system requirements needed for the deployment.
- D. **Implementation Plan** including the project plan and setup of interfaces to other products.
- E. **Cost Proposal** that states the total contract not-to-exceed amount, including travel and other project expenses, for implementation services and subscription costs for term of the agreement and for the optional renewal term of the agreement. Provide a payment schedule is proposed it should be based on specific milestones/deliverables outline in the implementation plan.

AFFIDAVIT OF POSTING

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I declare under penalty of perjury that I am employed by the City of West Hollywood in the Office of the City Clerk and that I posted this agenda on:

Date: March 6, 2019

Signature: Hydat Postelton