ITN #2024-001 - Customer Relationship Management "CRM" System
EXHIBIT A – Scope of Work
Format for Response

Tab I- Qualifications and Experience (40 Points Maximum)

A. Respondent Qualifications (Company Profile)

The response shall be written in non-technical language to summarize the ITN respondent's (Respondent) overall capabilities and approaches for providing, managing, and accomplishing the services specified herein.

The Respondent must include a description of the organizational structure and management style established and the methodology to be used to control cost, ensure reliable services and to maintain schedules; as well as the means of coordination and communication between the organization and the Tax Collector's office (TCO).

Information about the company's experience shall be submitted including company profile, experience, and years in business. Provide detailed information regarding the current financial condition and outlook of the organization, including ratings, memberships or listings regarding or affecting the financial well-being of the organization. Respondent shall provide any information regarding any current or potential litigation, bankruptcies, sale, mergers or acquisitions that could affect the financial condition or outlook of the organization.

B. Staff Management

Respondent shall (1) fully describe its resources and ability to provide staff continuity for the project, (2) specifically address processes and procedures for staff hiring and retention, as well as turnover and replacement during an ongoing project, and (3) describe the notification process for staff turnover and replacement during an on-going project.

C. Projects of Similar Size and Scope

The Respondent shall fully describe experience with projects within the last three (3) years of similar size and scope as the project specified herein. Respondent shall include any projects that involved regulation or licensing applications.

D. Government Entity Experience

The Respondent shall fully describe experience and projects with governmental entities, including any state, local or federal entities and describe any differing management or approaches between government and private sector projects.

Tab II- Technical Proposal and Project Management Plan (120 Points Maximum)

A. Technical Proposal (70 Points Maximum)

The Respondent is required to provide comprehensive narrative that fully describes its technical proposal for a CRM solution. The TCO requires information regarding the flexibility/portability of the solutions to adapt to the ever-changing technology landscape.

Proposals shall include details about data ownership, management, and utilization outside of normal government operations. Details of what to expect at the end of the contract period shall be provided to clarify what attributes of the system are property of the TCO, how they will be transferred back to the TCO's possession and the approximate timeframe to do so. The Respondent's narrative shall address in detail the mandatory qualification items set forth below under the appropriate headings and tabs.

1. Objectives

Describe how the Respondent's proposed CRM solution shall, at a minimum, provide the following objectives:

A. The CRM solution shall be–integrated with existing systems of record and replace currently deployed systems. This will replace the TCO's off the shelf incident management systems and internally developed correspondence.
B. The CRM solution shall exceed all of the current TCO system's capabilities.
C. The CRM solution shall also provide online offerings (apply, renew, take payments, upload attachments, create accounts, file a complaint, miscellaneous transactions, etc.), Omni-channel communication functionality, robust database search functionality, multi-language functionality, and a wizard assistant (to guide customers through various transactions when interacting with the agency).
D. The system shall be robust enough to incorporate existing business rules, handle new business requirements and be suitable to be the system of record for the agency.
E. The CRM solution shall be a No Code/Low Code solution.
F. The CRM solution shall be able to display correspondence from the Department as well as the status of the application; Meaning the system should have enough intelligence to show all customer inquiries and their statuses to the agent handling the request.
    - Example:
        - John Doe calls the contact center and the agent answers the call.
        - The system should reverse lookup the number or be able to manually search for the client record.

- Once accessed, the client record should identify major information points and ALL prior correspondence, including email, call history, social media chat or mention, etc.

2. Outcomes

Describe how the Respondent's proposed CRM solution shall produce and deliver the following outcomes:

A. Shall improve overall customer experience by providing a modern user interface (UI) to the current functionality.
B. Reduce the Customer Contact Center call volume for self-service administration functions.
C. Shall manage the CRM solution replacement costs by using existing middleware applications and accessing an existing library of in-house developed functions.
D. Shall provide a "wizard" type automated process to reduce work required by agency staff to perform routine daily tasks.
E. Shall provide increased flexibility for configuration updates in the CRM solution administration interface that does not require custom code development by either the CRM solution vendor or through in-house development staff.
F. Shall provide a modern rules engine(s) to automate and integrate current manual workflow processes, including form logic, validation, and reporting.
   - These rules should be capable of being applied globally AND for each business unit for workflow and automation.
G. Shall provide the capability for customers to submit inquiries, create and self-manage an account, submit complaints, make payments, upload large attachments, etc.

3. Software, Hardware, and Technology Solution(s)

Provide narrative that describes the Respondent's software, hardware, and technology solution(s) that shall be used to administer and support the services required in this ITN.

A. Describe the CRM solution the Respondent is proposing to implement including all modules and details of the functionality each module provides.
B. Describe how the Respondent's proposed solution shall maintain and support the CRM solution, including software, hardware, and technology.
C. Describe the enhanced value of the software, hardware, and technology the Respondent proposes, including the Respondent's reasons for proposing them.
D. Describe the process for receiving, validating, prioritizing, and estimating level of effort for requested enhancements to the proposed CRM solution.
E. Describe the proposed solution's ability to deliver the services requested in this ITN at the scale required to serve the customers of the TCO.
F. Describe how the proposed solution's ability to evolve to meet the expanding needs of the TCO's customers. Provide the technology roadmap for the

Respondent's proposed solution detailing planned upgrades to functionality that shall be made available to the TCO and included in the Respondent's Cost Reply.

G. Describe the Respondent's plan to ensure the proposed solution is responsive to and able to incorporate technological innovations in governmental regulation and administration of professional and occupational licensing.
H. Provide all available documentation (feature descriptions, use cases, demos, user guides, technology leveraged, etc.) regarding the verifiable functionality to be delivered by the proposed solution and included in the Respondent's Cost Reply.
I. Provide a complete list of all individually licensed products that the proposed solution requires (*e.g.*, product type, name, and function).
J. Describe the nature of the proposed solution (*e.g.*, Software as a Service (SaaS) - cloud specific, SaaS - cloud agnostic, cloud hybrid, or other).
K. Detail the available licensing models for each proposed product in the solution (*e.g.*, subscription, perpetual/maintenance).
L. Detail the license pricing units (*e.g.*, number of uses, sessions or API calls), cost of each and forecast annual and/or monthly volumes.
M. Describe the way the proposed solution is resilient and portable in a situation where it becomes necessary to change cloud service providers in the future.
N. Describe a typical departure from the proposed platform. What aspects of the solution as configured are possessions of the TCO, and in what format would the data be returned to the TCO? By what medium are the digital assets transferred, and how long does that process take to complete (estimation based on extraction speed per unit of storage is acceptable)?
O. Detail all possible use of the TCO's data outside of TCO operations by the proposed solution. For each product in the proposed solution, indicate if the underlying cloud service provider reserves any and all rights to process TCO data for its own purposes, commercial, technical or otherwise. Please indicate each product in the proposed solution that reserves any and all rights to process metadata for its own purposes, commercial, technical or otherwise.

4. System Migration/Transition Services

Provide narrative that describes the Respondent's approach to providing the following System Migration/Transition Services.

A. Configuration of CRM solution.
B. Migration of data from existing systems CRM.
C. Migration of content from existing TCO systems and platforms to the CRM solution.
D. Deployment to production of the CRM solution and all configuration and integration items.
E. Development of licensing applications to be rebuilt in the new platform.

F. Development of CRM escalations, search functionality, ability to take payments, and update customer information and interactions.
G. Post-implementation transition services shall include support for operations and ongoing maintenance of the CRM solution as needed.
H. Provide what connectivity infrastructure would need to be procured to enable the success of the proposed solution.

5. Implementation Services

Provide narrative describing the Respondent's proposed approach to implementation of the CRM solution including system functionality, timelines, and milestones. The project management plan shall at a minimum address all the following services and tasks:

A. Respondent shall provide sufficient staff, tools and templates, methods and frameworks, mentoring and training, and other capabilities to deliver the services required to ensure that implementation of the CRM Solution is successful. The responsibilities for all project activities are to be delineated in a separate RACI document between the Respondent and the TCO and documented as such. Such documentation is due within a negotiated number of days after Contract execution.
B. Respondent shall develop strategies prior to the execution of implementation services. These strategies shall promote a unified and consistent approach for project management, staffing, processes, and based on business requirements identified and approved by the TCO. Such strategies are due within a negotiated number of days after Contract execution.
C. Respondent shall be responsible for planned and scheduled communication to related Business Units and other TCO stakeholders on progress of project timeline and milestones.
D. Respondent shall assist the TCO in developing communications to the general public and current user base prior to release of the CRM solution.

6. Interface/Integration Services

Provide narrative that details the Respondent's approach to migrating existing interfaces/integrations, including ancillary applications (if any). Describe all anticipated interfaces that shall be inbound to and outbound from the Respondent or subcontractor for success of the proposed solution. This plan shall include at a minimum the following elements:

A. File name (technical and common)
B. File description
C. Name of entity the file is sent to or received from
D. Timing and intervals of the interface
E. File layout and detailed build/load specifications
F. For outbound files, where the file is generated from, and
G. For inbound files, where the file is to be loaded.

H. Configuration changes to existing middleware applications to integrate with the new CRM system. This could include middleware application version updates as required.

I. Configuration change or minor modifications to existing library of in-house developed code to integrate with new CRM system in conjunction with internal staff.

7. Systems Architecture Services

Provide narrative that includes the Respondent's proposed approach to managing all system architecture components, including at a minimum, talent management, hardware/infrastructure, and software/applications. This plan must also address the following elements:

A. Respondent shall provide and maintain up-to-date, adequate system documentation, documenting applications specifics, architecture information, systems security, and configuration.

B. Respondent shall maintain a positive relationship with TCO staff and work collaboratively to ensure proper performance and availability of all CRM solution applications.

C. Respondent shall work with the Department's project team to estimate, design, develop, test, and implement configurations/customizations.

D. Respondent shall comply with section 508 of the Rehabilitation Act of 1973, as amended and 29 U.S.C. s. 794(d), including the regulations set forth under 36 C.F.R. part 1194. Section 282.601(1), F.S., states that "state government shall, when developing, competitively procuring, maintaining, or using electronic information or information technology acquired on or after July 1, 2006, ensure that State employees with disabilities have access to and are provided with information and data comparable to the access and use by State employees who are not individuals with disabilities."

E. Respondent shall be engaged to proactively monitor system health and report any issues to the Department within timeframes described in the Service Level Expectations to be included in any Contract resulting from this ITN.

F. If hosted, the Respondent shall provide:

    1. Server management, including operating system, system utilities, security, and operating systems (OS) patches, and monitoring health and availability;
    2. Database system management administration and business database administration;
    3. Web server and application server support and configuration;
    4. Firewall and other switch support and configuration;
    5. Application delivery and load balancer support and configuration;
    6. Storage management; and
    7. Disaster recovery site and replication support.

8. Testing and Quality Services

Provide narrative that describes the Respondent's proposed approach for providing Testing and Quality Services. The portion of the plan related to Testing Services shall address developing test scripts, managing testing activities, testing roles and responsibilities, environment/technical approach (unit, integration, system, user acceptance testing, regression), and the tools needed to test system changes before release to production. The portion of the plan related to Quality Services shall include the Respondent's proposed approach to managing and monitoring the quality of services, software, and operations of the CRM solution. This plan must also address how the Respondent shall satisfy the following elements:

A. Respondent shall perform full system testing of the CRM solution base capabilities.
B. Respondent shall perform full system testing in accordance with current TCO change management processes.
C. Respondent shall support full user acceptance testing of the ready-to-deploy integrated system.
D. Respondent's application management team shall provide functional testing and performance/tuning needed to support related batch jobs and reports for the CRM solution.
E. Provide a monitoring tool to ensure compliance with any negotiated Service Level Expectation related to application response time, i.e., how long it takes for a screen to return after a user clicks a button) for transactions that are of highest volume within the CRM solution.
F. If hosted, provide a system monitoring program to ping the production and test environments on a regular basis to ensure maximum system uptime.
G. The system shall be configured to provide alerts of outages of the CRM solution. These alerts shall be sent automatically to the TCO's contact of choice.
H. If hosted, upon resolution of system outage, the Respondent shall conduct a root cause analysis and provide the analysis to the Department within five Business Days.
I. Respondent shall use the development and system testing environments to support application development and configuration activities. This shall enable coding changes to be implemented in a controlled environment where they are tested for confirmation of intended functionality and shall allow the TCO to validate that the changes do not negatively impact online response time or existing functionality.
J. Respondent shall establish a system fix/change review process with the TCO for reviewing and prioritizing system development efforts.
K. Respondent shall provide and maintain comprehensive testing documentation, including detailed procedures and testing scripts, which are updated on a regular basis for system enhancements.

L. Respondent shall support troubleshooting of performance issues and testing solutions to these issues.
M. Respondent shall incorporate extensive quality assurance practices in system development and configuration management, including complete system quality checks after every code release which prevents interruptions to business processing.
N. Respondent shall prepare design documentation and estimates for Change Requests submitted by the TCO or identified by the Respondent. The Respondent shall be responsible for tracking all change requests.
O. Respondent shall provide software tools, such as survey software, to gather, manage, and measure satisfaction of customers and potential customers to inform training needs and system enhancements related to the CRM solution.
P. Respondent shall proactively communicate events, issues, and changes that may impact customer (end-user) interaction with the CRM solution.

9. Training Services

Provide narrative that describes the Respondent's proposed approach to any methods for training, including training users in use of its proposed CRM solution and training internal staff supporting the solution. This plan must also address how the Respondent shall satisfy the following elements:

A. During the duration of the project, Respondent shall provide and maintain a training environment of the CRM solution to be used for testing and training operations. All training environments must be refreshed periodically, at a frequency agreed upon with the TCO.
B. Respondent shall support the distribution of training communications to the TCO staff for the CRM solution.
C. The Respondent shall create and maintain performance reports, as identified and developed in cooperation with the TCO. These reports must be easily read and understood with the purpose of assisting analysis related to customer experience and providing identification of possible training points.
D. Respondent shall work closely with the TCO to champion change management efforts that lead to full acceptance of the CRM solution.
E. Respondent shall support, provide materials for, and participate if requested in TCO meetings. The Respondent shall assist with developing presentation materials, present on specific topics as requested, provide administrative support during the meetings, record and distribute meeting minutes, follow-up on technical issues that are raised, and assist in answering questions. This includes participating in debriefing meetings with the TCO to discuss any action items identified.
F. Respondent shall, upon request, provide designated TCO staff with training, at the TCO's or Respondent's facilities, regarding the functionality of the CRM solution.

G. The system shall display a welcome message for new customers (end-users) upon creation of the user profile.
H. Provide training links and other information to help support full use of the CRM solution for end-users.
I. Respondent shall develop online training in a way that provides a consistent online delivery format. All online training must be provided in a format suitable for the TCO's public facing website and for agency learning management systems for internal development staff.

10. Security Management Services

Provide narrative that includes the Respondent's proposed approach to managing and monitoring the security of its proposed systems and services and identifying security risks. This plan must also address how the Respondent shall satisfy the following elements:

A. Respondent shall maintain and track a roll-on/roll-off checklist to confirm appropriate security access and controls for people working on the CRM solution, supporting state audit inquiries.
B. Respondent shall implement data privacy standards across project operations, including but not limited to, completing random security walkthroughs to confirm proper handling of client data.
C. Respondent shall develop and maintain a compliance tracking tool (*e.g.*, a compliance tracking workbook) that documents conformity with the required functions and risk assessment as outlined in Rule 60GG-2, Florida Administrative Code. The Respondent must update this compliance tracking tool at least annually, upon Contract anniversary.
D. If hosted, the Respondent shall ensure that an independent third-party audit is conducted on security controls at least annually and shall correct deficiencies identified in this audit within the Department's identified timeframes.
E. Contract shall adhere to identity management requirements as outlined in Rule 60GG-5, Florida Administrative Code.

11. Disaster Recovery & Business Continuity Services

Provide narrative that describes the Respondent's proposed approach, methodology, and timelines associated with business continuity in the event of a disaster or major system outage. At a minimum, the plan shall address the following:

A. Respondent shall develop within sixty (60) days of contract execution and update annually.
B. Upon contract anniversary, the Respondent must deliver a disaster recovery plan that ensures system availability in the case of a disaster.
C. If hosted, the Respondent must perform an annual test of the Disaster Recovery Plan and present the results to the Department.
D. Respondent's Disaster Recovery Plan must satisfy the following requirements:

E. A plan of action for any unexpected interruption of business operations that is beyond the scope of daily operating response procedures.
F. Maintenance of backup systems for all state employment files and production data maintained on Respondent's system.
G. A determination of the general nature and potential range of adverse events, so that the Business Continuity Plan adequately addresses the risks.
H. Procedures to activate an immediate, orderly response to emergency situations to protect and/or recover critical assets and functions.
I. Procedures to obtain critical resources necessary for recovery, including hardware, software, space, files, power, and finances.
J. Operations shall automatically fail-over to the secondary site in the event the primary site is not available and fail-over to the primary site in the event that the secondary site is not available.
K. Procedures to monitor, test, and restore proposed systems and/or services as well as those of Respondent's subcontractors.
L. Identification of key team personnel with established and assigned team responsibilities and training requirements for each team member to perform specific duties.
M. A methodology and identification of current and future critical applications and services.
N. Reporting of recovery point objectives and actual times.
O. The physical location of the Respondent's disaster recovery systems and data as well as those of the Respondent's subcontractors.
P. The recovery time and recovery point objectives shall meet or exceed the capabilities of the underlying systems of record, OnBase and Versa: Regulation

12. Project Staffing

The Respondent must provide the names of all key personnel on the Respondent's team, as well as a resume or curriculum vitae (CV) for each individual proposed and a matrix which describes the functions and responsibilities of each key person relative to the tasks to be performed. The approximate percent of time to be devoted exclusively for this project and to the assigned tasks shall also be indicated in the matrix. **Respondent shall only identify personnel who will be assigned to this project.**

13. Project close-out

Respondent shall ensure that once the project is complete, the project is closed out with all deliverables accepted and approved, all TCO data or equipment is secured and/or returned to the TCO and all system documentation is presented for final payment.

B. Project Management Plan (50 Points Maximum)

Provide narrative that fully describes the Project Management Plan, which includes Respondent's proposed approach to governance and roles and responsibilities. This plan must also address how the Respondent shall satisfy the following elements:

A. Completion of all deliverables as defined in the ITN and any subsequent contract.
B. Communications plan for all aspects of the project.
C. Project schedule management.
D. Tracking tool monitored by the Respondent's Project Manager to ensure all deliverables are completed.
E. Tracking tool monitored by the Respondent's Contract Manager to ensure all deliverables are completed.
F. Quality assurance process plan to ensure deliverables are acceptable to the Department.
G. Oversight, including resource planning, risk management, change control, budget control, and quality assurance, for the CRM solution.
H. Change management for requests made by the TCO.
I. Document collaboration site for both the TCO and Respondent teams to communicate and collaborate on program-related documentation including, but not limited to, training materials, SLEs and deliverable documentation, ad-hoc reports, and other supporting documentation related to the CRM solution.
   and deliverable documentation, ad-hoc reports, and other supporting documentation related to the CRM solution.
J. Operations Plan which comprehensively covers the processes performed, performance metric management, tools utilized, and resources deployed to support the CRM solution.
K. Periodic meetings to be held with the TCO. Such meetings shall be scheduled with at least five (5) days advance notice. These meetings shall include, but may not be limited to:
L. System release meetings to discuss the success and lessons learned of the most recent system release as well as discussion on future Change Requests. The Respondent shall be responsible for maintaining the log of Change Requests. The TCO shall have final approval on what is contained on the monthly meeting log, which approval shall not unreasonably be withheld or delayed.
M. A quarterly business review meeting to review and discuss various operational issues.
N. A quarterly executive leadership meeting to review status of ongoing tasks, schedules, changes, challenges, and such other matters as appropriate (among other things, the Respondent shall include information on strengths, potential areas for improvements and related improvement plans, cost reduction proposals, and other matters such as changes in industry best practices).
O. The Respondent shall also coordinate and participate in quarterly business review meetings between any subcontractors and the TCO to review and discuss various operational issues, if applicable.
P. Bi-weekly Project Management review meetings with the TCO.

Q. Bi-weekly Communication and Training meetings with the TCO (which may be combined with bi-weekly Project Management review meetings).

Respondent shall ensure that once the project is complete, the project is closed out with all deliverables accepted and approved, all TCO data or equipment is secured and/or returned to the TCO and all documentation is presented for final payment.

Tab III- Functional and Technical Questionnaire Exhibit C (70 Points Maximum)

The Respondent shall complete and submit Exhibit C, the Excel spreadsheet titled "Functional and Technical Questionnaire.". Based on the CRM's services or solution proposed, the Respondent shall complete and submit Exhibit C, Functional and Technical Questionnaire (Excel Document) as part of the Technical Reply.

Tab IV- Past Performance/References Exhibit D (10 Points Maximum)

Respondents shall submit Exhibit D, "Reference Form" under Tab IV as the final part of Respondent's Technical Reply. The Respondent must list all the names under which it has operated during the last three (3) years from the issuance date of this solicitation.

Also, in the spaces provided on Exhibit D, the Respondent must provide the required information for a minimum of four (4) separate and verifiable clients. The Respondent's work for the clients listed must be for work that is the same as that specified in this solicitation. Confidential clients shall not be included. **Do not list the TCO as a client reference.**

The same client may not be listed for more than one (1) reference (for *e.g.*, if the Respondent has completed a project for the Florida Department of Transportation – District One and one project for the Florida Department of Transportation – District Two, only one of the projects may be listed because the client, the Florida Department of Transportation, is the same).

Firms that are currently parent or subsidiary companies to the Respondent will not be accepted as Past Performance references under this solicitation.

In the event that the Respondent has had a name change since the time work was performed for a listed reference, the name under which the Respondent operated at the time the work was performed must be given at the end of the project description provided on Exhibit D.

In the event that Respondents submit a reply as a joint venture, at least one (1) past performance client must be listed for each member of the joint venture. However, the total minimum number of clients to be listed remains four (4).

References should be available to be contacted during normal working hours. At its own discretion, the TCO shall choose three (3) of the Respondent's references to contact to complete the evaluation questionnaire provided in Exhibit E.

The TCO will attempt to contact each selected reference by phone up to three (3) times. In the event that the contact person cannot be reached following the specified number of attempts, the Respondent shall receive a score of zero (0) for that reference evaluation. The TCO **will not** attempt to correct incorrectly supplied information and **will not** select a replacement for a non-responding reference.

Failure to provide the required information for a minimum of four (4) separate and verifiable clients in the spaces provided on Exhibit D or failure to provide the required information for each reference shall result in the Respondent receiving a score of zero (0) for the Past Performance section of the evaluation criteria.

Tab V- Cost Reply Workbook Exhibit F (35 Points Maximum)

Each Respondent shall use the excel template provided as Exhibit F, "Cost Reply Workbook" to provide rates for the services requested in this solicitation. This Tab, Respondent's "Cost Reply Workbook, shall be packaged and sealed separately from their Technical Response and other materials. Failure to comply with this requirement shall result in the reply being deemed non-responsive and therefore, the reply will be rejected.

TCO is seeking pricing that will provide the best value; therefore, Respondents must submit a Cost Reply Workbook utilizing the Cost Reply Workbook form provided as Exhibit C. Respondents are encouraged to submit their Cost Reply Workbook in such a manner as to offer the most cost effective and innovative solution for services and resources the Respondent can offer, as cost efficiency for the TCO will be a consideration in determining best value. Respondents shall provide the Cost Reply Workbook according to the instructions provided in the ITN.

The rates provided shall include the cost of all things necessary to accomplish the services requested in this ITN, including, but not limited to Respondent's furnishing the necessary personnel and labor, supplies, equipment, services, insurance, travel and incidental expenses, miscellaneous expenses, and the application of all multiples (*i.e.*, overhead, fringe benefits, etc.).

Failure by the Respondent to provide Exhibit F: Cost Reply Workbook shall result in the reply being deemed non-responsive and therefore, the reply will be rejected. Footnotes, notations, and exceptions made to Exhibit F shall not be considered.

Tab VI Virtual Presentation (25 Points Maximum)

Respondents will have the opportunity to provide a virtual presentation or virtual demonstration of the proposed solution and services that they included in their Reply, along with an opportunity to showcase their qualifications and experience with similar projects.

The TCO will provide Respondents an opportunity to make a thirty-minute virtual presentation for the evaluators following receipt of the Replies. Links for the virtual presentation along with an agenda for the presentation will be provided to those Respondents deemed responsible and responsive.

Tab VII Additional Items

Replies to this ITN must include the following documents and certifications:

- Disclosure Statement/Conflict of Interest Disclosure
- Certifications and Assurances Form
- Affidavit – Notice of Trade Secret, if applicable.