

Addendum 1
ITN #2024-001
Customer Relationship Management
“CRM” System

The Constitutional Tax Collector serving Palm Beach County (TCO) hereby amends **Invitation to Negotiate for Customer Relationship Management “CRM” System (ITN #2024-001)** to provide the following answers to questions received by TCO related to the ITN.

This ITN was released in an effort to find a partner to help us transition into an Enterprise CRM solution. The nature of an ITN is for interested parties to respond with ideas and solutions to the issuing entities requested specifications. We understand every line item may not be achievable or affordable but are seeking a best valued solution based on the ITN specifications. During the negotiation phase, additional details such as number of users, databases, volumes of information may be provided if necessary to allow respondents to provide a further refined solution prior to award.

All other parts of the ITN remain unchanged. In the event of a conflict between previously posted information and the information contained herein, the information herein shall control. The information included in this addendum is hereby made part of this solicitation.

If you have issues accessing the documents or information related to the ITN, please contact the Procurement Contact, Andres Martin, at the following email address: PROCUREMENT@PBCTAX.COM.

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Palm Beach County Tax Collector ITN # 2024-001

Questions and Answers

Question #	Question	Answer
1	Can you share the number and names of all the systems (in addition to Cisco, M365, Social Media, & Tyler Munis) that the proposed CRM system needs to integrate with?	Those are the primary systems required for integration. The remaining two are our Tax Platform Aumentum and State Application. Other systems will be consolidated into the awarded solution.
2	Can you share the payment processor	Bill2Pay.
3	Is there legacy data that needs to be migrated? If yes, can you provide details on the volume, complexity, and current system used to host the data.	The goal of ITN is to consolidate ALL systems into a centralized platform. Yes, legacy data (tickets, customers, requests, knowledgebases) will need to be imported. Further information is provided in the answer to Question 5.
4	What is the current volume of applications, business entities?	See Answers to Questions 1 and 18.
5	How many external users do you anticipate interacting with the CRM application?	Users are dependent on the feature sets the proposed solution provides and what external capabilities are available. Example: Chatbot, Social Media, solutions that link back to knowledgebase documentation. Each of these applications have their own adoption rates that could increase external use.
6	How many request management application (RMA) systems will the current CRM be replacing? What are the software platforms the RMAs are currently hosted on?	See Answer to Question 47.
7	Can you provide more details on existing IT infrastructure and any known challenges or constraints related to integration?	Existing IT infrastructure is a standard Microsoft environment with MSSQL as the baseline. We have approximately 10 SQL instances and 3 terabytes of information locally with the rest residing with our partners. If additional information is required, such information will be provided during the negotiation phase of the ITN.
8	Has PBC seen demos of solutions from vendors?	No.
9	To ensure that our proposal is both comprehensive and realistic, can you provide any guidance on expected scale and scope of investment for the CRM project?	Not at this time.
10	The virtual presentation, could you provide the format and content expectations for the virtual presentation	We want to see a demonstration of how the proposed solution works.
11	Exhibit A - A.1.B: "The CRM solution shall exceed all of the current TCO system's capabilities." please list the current capabilities Exhibit C -	Please see PBTC CRM-ITN #2024-001 and Exhibit A.

12	Do you have an existing knowledge base for external users? Internal users? Is this to be housed in the new system?	A knowledge base for internal users exists; external would be built upon chosen platform.
13	Exhibit A Tab II - A.2.C - Can you please elaborate this. Is the existing middleware already owned by you? If so, what is the middle ware?	We do not have a middleware platform.
14	Exhibit A Tab II - A.2.C - elaborate on what the existing library of in-house developed functions refers to	We have multiple internal (client) correspondence systems that shall be consolidated into the chosen solution.
15	Exhibit A Tab II - A.2.G - what is defined as a large attachment? What is the upload size that is required?	Attachments are email sized, 1-100M. Anything else can be stored using a pointer.
16	How much data is to be migrated? Number of records? Number of databases? Number of files? Total size of files? Largest file size to be migrated? Average file size to be migrated?	Assume standard Microsoft environment with MSSQL as the baseline. We have approximately 10 SQL instances and 3 terabytes of information locally with the rest residing with our partners. If additional information is required, such information will be provided during the negotiation phase of the ITN.
17	Exhibit A Tab II - A.6.I: is the ask for the vendor to modify code within the existing library of in-house developed code, and not just modify integration functions on the new solution? If yes, what are the existing in-house libraries?	No, the specifications request a solution that will consolidate the required systems into the proposed solution.
18	Exhibit A Tab II - A.6.H: What is the existing middleware? And how many integrations are there? Identify the systems that are included in this number.	There is no currently dedicated middleware. We are asking for solution to consolidate MSSQL based systems into a centralized system with hooks into Call Center, Web, client lookup, and financial systems as described.
19	Exhibit A Tab II - A.8.O: are these surveys for internal or external users.	Both (internal and external).
20	Exhibit C requirement: "Ensures that all existing functionalities, business logic, and rules engines are correctly mapped in the new system." please supply a list of the existing functionalities, business logic and rules	Our systems primary use routing based on subject or source (technician or email) as a basis for a simple workflow. This would be the baseline for a more comprehensive workflow. I.E. Route to person one, then two, check for idle time, escalation, etc. Please see PBTC CRM-ITN #2024-001 and Exhibit A. If additional information is required, such information will be provided during the negotiation phase of the ITN.
21	Exhibit C: what is your definition of a business entity?	The business entity would be the Tax Collector. The purpose of section 4. Business Entity is to ensure the client has the capability to edit, create, and modify core workflows, reporting, or add additional business lines without professional services.

22	Exhibit C: Please elaborate on the following requirement: "Provides a scheduling capability for long-running processes to support time-based internal and external updates as needed."	In order to avoid long running/system intensive processes running during peak times, the solution should have capability to schedule such actions. This should happen automatically or scheduled as needed (for user generated queries/system functions). This feature should be available for internal and external updates (or routines).
23	Will the County extend the proposal by three weeks to accommodate for the holiday and give vendors time to update responses based on responses to questions?	The deadline for reply is August 20, 2024 at 2pm EST.
24	Can you please provide a breakdown of the roles, responsibilities, and counts of the 335 budgeted positions within TCO? a. ITN, Page 1, I. Introduction and Purpose of the ITN	See ITN Section I. Introduction and Purpose of the ITN. See also, Attachment 1, which includes Organization Chart.
25	Regarding web portal capabilities, can you provide an estimate on the number of authenticated logins per month? a. Exhibit C, Row 29	We currently do not have an estimate. We are hopeful any solution will scale, but it depends on the adoption rate of the features by the public.
26	Regarding Mobile iOS and Android apps for public users, is a complete mobile application that would be made available on the respective App Stores required or will a public interface that is responsive such that it can be used on mobile devices and tablets without the need for horizontal scrolling sufficient? a. Exhibit C, Rows 100-102	Our current website re-design is being done to be mobile friendly whereas items on the desktop version will be stacked in the mobile version so there will be vertical scrolling when accessing through a mobile device but it will all adjust automatically. We have no plans to create/launch an App at this time.
27	What additional communication channels enabled other than Chatbots and Agent Chat (IE SMS, Facebook Messenger, WhatsApp)? a. Exhibit C, Row 90	We currently do not have a Chatbot enabled but will be a fast follow once we launch the new website, probably sometime in early 2025. We do use Facebook Messenger when we ask clients who have posted a question to send us some personal info, we ask them to use Facebook Messenger to communicate with us. We do not use WhatsApp.
28	If SMS is desired as a communication channel, approximately how many outbound SMS messages do you anticipate sending per month/year?	At this time, it is not our intent to use SMS messaging.
29	Approximately how many Chatbot conversations do you currently experience per month? a. Exhibit C, Row 64	We do not currently utilize a chatbot.
30	Regarding M365 integration with email, calendar, and Teams communications channels, can you briefly describe the desired level of integration and capabilities desired? a. Exhibit C, Row 89	The proposed solution should be capable of sending an email, looking up a contact, calendar availability, and sending a message in teams.

31	Are there specific data residency or compliance requirements that should be considered?	As a government agency any solution must be government compliant. Continental US, SSAE16, etc.
32	Do you have additional compliance requirements above and beyond HIPAA (ie FIPS 140-2, NIST) that would require a FedRAMP moderate or high hosted solution?	Not at this time.
33	How many payments do you process on your website per year? a. Exhibit C, Row 110	The ITN's specifications request a solution for a CRM system and will not be processing any payments nor will it take over any functionality surrounding payments.
34	Do you require in-person POS payment processing capabilities? a. Exhibit C, Row 110	No, those are already in place. The CRM would not be performing any payment processing or cashiering.
35	Integration. Do you currently own an API integration that will be leveraged to meet integration requirements? a. Exhibit C, 12. Integrations	No.
36	How many internal and external systems are there that require integration other than Munis ERP and Cisco Contact Center Unified CCMP that are identified? Can you please provide a list of systems that you wish to integrate? aj. Exhibit C, 12. Integrations	See Answer to Question 1.
37	Regarding self-service capabilities via phone, is there an existing contact/call center? If so, is this call center supported internally by TCO or is it supported via a BPO model? a. ITN, Page 3, 3. External	Yes, the call center is supported internally by TCO.
38	How many internal call center agents and supervisors will need access to the system? a. ITN, Page 3, 3. External	Approximately 35 agents, 3 seniors, 3 managers and 1 director.
39	Can you please provide an estimate on the number of surveys sent each year to measure customer satisfaction? a. Exhibit A, Pg 8, Sec Tab II.A.8.	Approximately 600,000 are sent each year to measure customer satisfaction.
40	Please list the current applications that the new CRM will need to integrate with	See Answer to Question 1.
41	How many call center agents does TCO have?	See Answer to Question 38.

42	Please elaborate what TCO means by " front-end users should not need to directly interface with the channel itself, but rather, the CRM interface - Exhibit A, Section A. 2. Internal	If a user (TCO employee) is responding to a CRM inquiry within the CRM system it should be irrelevant to the technician where the inquiry originated. When the TCO employee replies within the CRM system, the response would automatically get 'posted' to appropriate platform (email, IM, social, chatbot, etc.) We understand that there may be technical limitations to this but please describe the solution, if possible.
43	What are the current CRM systems in use by TCO?	See Answer to Question 47.
44	Please break down the # of Administrative users vs. Standard Users	This cannot be determined at this time. More information will be provided in the negotiation phase if necessary.
45	Please confirm TCO would like the initial contract term to be 5 years	The contract will be negotiated for a term up to 60 months (5 years).
46	On Exhibit C, are comments required?	Vendors' answers to the Functional and Technical Questionnaire are required. The Notes section in Exhibit C is for Vendors to provide additional information, if necessary, but is not required.
47	What are the three departments within TCO that currently have independent/separate request management software? Can you elaborate on their processes and interoperability?	The following 3 departments have separate management software: a. Quality Assurance (Excellence) b. Call Center c. Information Technology These systems are all ITIL standard request management solutions with workflow. They are SQL based.
48	Can you elaborate on their high level processes, case routing, and overall interoperability?	See Answer to Question 20.
49	Even though the goal is to build an organization-wide CRM system, can you provide examples of unique requirements or business processes per department?	This level of detail will be discussed during the negotiation phase of the ITN to help the vendor map processes. CRM should be able to track all inquiries coming into the agency, where they are in the process, and report status and escalation to the appropriate individual.
50	Does each department's current request management system(s) manage both internal and external requests? If not, what is used for internal requests and external requests per department?	Only three departments currently use CRM systems. Those departments use them to manage both internal and external requests.
51	Will any of the current request management systems remain and require an integration?	See Answer to Question 1.
52	What other systems that are currently available to TCO employees will the proposed solution need to integrate with?	See Answer to Question 1.

53	Can you list all external partner sources, applications, databases, etc. that we either need to regularly ingest data from and/or integrate with?	See Answer to Question 1. If additional information is required, such information will be provided during the negotiation phase of the ITN.
54	Can you provide more details on the "existing middleware applications and accessing an existing library of in-house developed functions" mentioned in section 2 of Exhibit A - Scope of Work?	See Answers to Questions 13 and 18.
55	What data sources / databases (department owned or third-party) do we need to integrate with?	See Answer to Question 1. If additional information is required, such information will be provided during the negotiation phase of the ITN.
56	What is the foreseen data migration scope - what record types / tables are expected to be migrated to the proposed system? What is the volume of data we're looking at? Do we need to consider active and historical data?	See Answers to Questions 3 and 16.
57	Does TCO have any data retention policies our proposed solution needs to adhere to?	Yes.
58	What data needs to be accessible to external customers?	We currently do not have externally facing data except for web site information. However, for the purpose of the ITN this will be determined based on the proposed solution and feature set.
59	What modules/features/functionality is leveraged in Tyler Munis currently? What is the scope of the integration between our proposed solution and Tyler Munis?	Tyler Munis is our financial system for GL, AR, AP, and distribution. The proposed system should be able to perform account lookups.
60	Can you elaborate on the online/electronic payments process outlined in the diagram on page 2 of the ITN?	This diagram was provided as a high level overview of TCO processes. Online payments are an input into our Tax collection and financial systems. Electronic payments are an output as we collect and disperse those payments. The CRM system will be used to pull status information on these processes (is paid, is not paid, timestamps, inquiry about transaction, etc.) and will not be engaging in any payment processing by itself.
61	Which payment processor does TCO currently leverage? Is TCO open to leveraging a new payment processor provider or do we need to integrate with the current provider?	We have a current contract with Bill2Pay for payment processing. However, the CRM solution being procured will not be processing payments.
62	What are the use cases for payment processing? What types of payments will be accepted?	The requested CRM solution will not process payments.

63	Can TCO elaborate on the use cases for public and private messages being sent on social media?	Through our social media channels, we often get requests from clients for assistance with their individual needs. Example 1: What do I do with my license plate once I sell my car? We would then provide them with information about surrendering a tag. Questions about their individual tax accounts. In this case, a Communications staff member would request the needed information from the client who posted the questions on social media and then he would then reach out to his internal network of contacts to get the information and then relay that to the client via a post on social media. Example 2: Complaints about service that hasn't completed their transaction. Again, a Communications staff member would reach out to them for detailed information and then work to provide either a resolution or explanation to the client via social media. We need a way to funnel these social media communications through a CRM system so it is logged and directed to the correct department for follow up and then finally back to the Communications department so they can post the response on social media.
64	What social media platforms do we need to engage/integrate with?	See Answers to Questions 1 and 63.
65	The provided documentation did not seem to specify but does TCO have any specific reports or reporting requirements that our proposed solution needs to satisfy?	If the product has standardized reporting for requests, SLA, violations, closures, etc. the requirements will be met. The solution should also allow ad hoc (frontend) and direct (database) query (backend).
66	How many reports do you foresee the vendor having to convert or build into the proposed solution?	Very few, see Answer to Question 65.
67	The request for a RACI document in section 5 of Exhibit A, implies that TCO has resources that can aid in the development of this new solution. If this is correct, please provide details on how many and what types of resources TCO plans to include?	<p>A project of this scope will involve multiple levels of the agency. Each level will have to participate in various phases such as fact finding, process mapping, testing, certification, etc.</p> <p>From this perspective the TCO will aid in development, and we will identify which party will be responsible, accountable, consulted, and informed.</p> <p>If this question is from a technical perspective, I.E. Technical resources such as project managers, programmers, and general IT technician availability that can be discussed further during the negotiation phase.</p>
68	Can you elaborate on the skillsets and planned level of involvement of TCO resources?	We will supply the appropriate resources to this project to ensure a seamless integration for the final solution.

69	How many and which languages will the solution support?	English is internally used; external facing should have the ability to switch depending which language integration the solution has.
70	What are the routine daily tasks that a wizard should be designed to process?	The wizard should handle any routine data updates, synchronization, or maintenance actions that would otherwise require manual intervention. This should be for system or reporting calculations.
71	Can you supply the list of rules that the rules engine should be able to perform?	Not currently. Business logic will depend on rules and workflow. If the product is capable of source to destination rules with intermediate checkpoints, then that should be sufficient.
72	What are the use cases for payment processing? What types of payments will be accepted?	See Answers to Questions 61 and 62.
73	Does TCO currently have a data warehouse? If yes, what technology platform is used?	We have Power BI and SQL.
74	Can you elaborate on "Staffing Services" in the cost category listed in Exhibit F?	Any costs for expenses related to staffing services for the proposed solution must be included.
75	Can you elaborate on "Payment Services" in the cost category listed in Exhibit F?	Any pass-through costs or expenses for third party services must be included in the final cost for the proposed solution.
76	With the 2 year implementation timeline, is there a preferred or priority in the sequencing for the implementation components (ex. phased implementation)?	Once awarded, the requisite milestones will be specified in the contract. Both parties will participate in timeline and priority development. We expect bi-directional participation based on vendor expertise and TCO needs for a phased implementation.
77	Are there target go-live dates for specific solution components that we should plan for?	Once awarded, the milestones will be specified in the contract. Both parties will participate in timeline and priority development.
78	Integration with Existing Systems: Would you please provide more details on your existing systems that the proposed CRM solution must integrate with, and any specific APIs or middleware that need to be considered?	See Answers to Questions 1 and 18.
79	Data Migration: Would you please provide the expected volume and complexity of data migration from the current systems to the new CRM solution?	See Answers to Questions 1 and 3.
80	Identity Management: For Identity Management (e.g., Role Based Access Control), is there a need for integration with an existing system?	Yes, the solution must integrate into MS Active Directory, global and local groups.
81	Licensing and Subscription Models: Would you please expand on the preferred licensing and subscription models?	This depends on the suggested solution by the vendor and whether it is on premise, hosted or hybrid.

82	Training and Support: What are the expectations for training and support post-implementation, e.g., onsite, virtual or a hybrid approach?	Yes, to all. We can support all these methods and anticipate using each during the contract period. We anticipate using all methods in training and support, post implementation.
83	Work Locations: Would you please provide your preferences for onsite project work vs. remote, or the use of a hybrid approach?	We can support all these methods and anticipate using each during the contract period.

Attachment 1
Palm Beach County Tax Collector ITN # 2024-001

PALM BEACH COUNTY TAX COLLECTOR'S OFFICE

OVERVIEW

