THE SEATTLE PUBLIC LIBRARY
REQUEST FOR PROPOSALS

Customer Relationship Management (CRM)
Platform & Implementation - RFP# SPL-R-1506-MR
Addendum #1 – August 07, 2015

This Addendum provides clarification changes to the RFP, answers to questions submitted by 12:00 PM 08/07/2015, email list of attendees, and the pre-submittal presentation.

Clarification Changes to RFP:

1. Procedures and Requirements 8.1
   Registration into City Registration System

   Web link is incorrect. The correct link is:

   https://web6.seattle.gov/FAS/OBD/NewRegistration.aspx

   Additional information is available at:
   http://www.seattle.gov/city-purchasing-and-contracting/consultant-contracting

2. Selection Process 10.1
   Initial Screening

   Change "REQUIRED SYSTEM CAPABILITY MATRIX" to read:
   "CRM REQUIRED CAPABILITY MATRIX.xlsx"

End Changes to RFP

Answers to Questions

The following are answers to questions submitted before the deadline:

1. How many users do you envisage using the system? A total number of named users as opposed to concurrent users. What are the number of CRM users to be utilized for the license costs? How many CRM users will there be?
   a. There may be up to five users at launch, but that number could increase in the future. It is unlikely we would ever have more than 10 users of the CRM

2. I noticed you use Constant Contact and Survey monkey- one of the strongest elements of our solution is the Email Marketing & Survey platform. Does this tender seek to replace these as well to provide consolidated system? Is your intent to replace tools such as SurverMonkey, Simply Measured and Trumba with the new solution? Surveys are included in your list of requirements. Do you want to replace Survey Monkey? If our solution can replace Trumba Calendaring, is that of interest to you? Should we include this in our bid?
   a. We seek to replace Constant Contact. Some departments may continue to use Survey Monkey for internal surveys.
   b. We are not planning to replace Trumba or Simply Measured at this time, but if your solution offers a valid alternative, please call that out.

3. How many users are responsible for sending email communications? Is this done by a centralized team?
   a. All email communications to our patrons are done by the Marketing and Online Services team (6 people). 2 members of this team will be the primary users of the CRM.

4. Are you able to inform us what 3rd party systems will be required to integrate and how many there are?
   a. The "other tools" listed in the RFP provides an approximation of 3rd party data that may be integrated initially. We expect that list may grow or change over time, and we will seek the guidance of the CRM vendor on which 3rd party integrations provide value and relative ease of implementation.

5. Are these integrations 1 way or bidirectional feeds?
   a. We expect there will be both.

6. Is there an annual membership or similar which is processed? Through another system? Will this system be part of the data to be integrated?
   a. No, there is no annual membership or similar concept.

7. Is this for just CRM or both Marketing Automation & CRM? RFP looked like it was heavy on the Marketing Automation side.
   a. CRM is our core use case, but we seek a product or solution that integrates marketing automation features.

8. Question in document: On page 5, Database Creation, details for "customer objects" includes "Web behavior." Can you define what you mean by Web behavior?
   a. For example, an authenticated user on our website registers for a 3D printing class. We then know that this user has expressed interest in 3D printing and provide relevant info and targeted content. This type of data will not be part of the initial implementation, but we will seek guidance from selected vendor on how to best integrate at a later date.

9. Will you be sharing the PPT presentation after the pre-proposal conference?
   a. The presentation is attached to this Addendum #1.

10. Question: Expand on this requirement: Bibliocommons (catalog software) activity and profile content integrated with customer object data. What do you envision will be integrated?

    a. Authenticated Bibliocommons users create user-generated content such as reviews and "likes." From this behavior we can infer interests and provide relevant info and targeted content. This data will not be included in initial implementation, but we will seek guidance from selected vendor on how to best integrate at a later date.

11. How many people do you currently have signed up to your newsletter?

    a. Approximately 167,000

12. How many people visit your site on a monthly basis?

    a. Spl.org receives approximately 1 million pageviews and 800,000 unique visitors per month. Our catalog (Bibliocommons) receives about 4 times as much traffic.

13. The estimated cost indicates an annual estimated budget, does this include implementation for the 1st year as well?

    a. We expect both implementation and any licensing fees to fall within this budget for 2015.

14. How much will weight (on the decision) be placed on "desired qualifications"?

    a. These will be considered as "additional capabilities" for a potential of 5 points awarded out of 100.

15. Where did the 60k number come from? Please provide any justification of the $60,000 annual budget for this project and any prosed breakdown of fees.

    a. This is a high-end estimate allowing for contingencies. Your cost proposal should demonstrate how you will maximize delivery of the best value for money.

16. What responsibilities are anticipated to be taken on by internal city employees, vs. implementation?

    a. Library staff are expected to produce templates and content to be distributed by the CRM.

17. On page 4 of the RFP: a separate project, the Library will seek a vendor to deliver a market segmentation analysis and database of our existing patrons and identify segments of potential patrons in Seattle. --- can you provide more detail about this?

    a. Please refer to the Market Segmentation RFP for more information.
    http://consultants.seattle.gov/2015/07/30/market-segmentation-analysis-rfp-spl-r-1507-mr/

18. How many integrations will there be in total?

    a. This will be determined during Phase 1, but consider the "other tools" listed in the RFP as an approximation. These will not all necessarily be included in the initial implementation. We assume that this work will be iterative and ongoing.

19. Are the integrations expected to be in the implementation cost?

    a. Some integrations will be part of implementation. Please include any assumptions you need to make in order to accurately scope this phase in your proposal. For initial implementation we will not necessarily do more than is needed to accomplish what we are currently doing with Constant Contact, and we will ask for the vendor's guidance for planning further third party integrations.

20. How are you segmenting today? Where is the data coming from?
    a. We currently send communications to a single, un-segmented list. We do have limited, anonymized demographic data about library patrons, but it is not associated with our mailing list at this time.

21. EZProxy for user authentication to access online databases - Can you provide more details on this application/functionality. How would this be linked with CRM?
    a. This is unlikely to impact the CRM, but this information was provided to clarify that our website does not have single sign-on user authentication.

22. Will you consider a full service campaign production model, or are you only seeking a self-service model?
    a. Our primary usage is self-service, but we are glad to accept proposals for services beyond the minimum requirements.

23. What reporting requirements do you have?
    a. Our minimum bar is equivalent to the reporting available through Constant Contact and Simply Measured, but we prefer a solution that can demonstrate more robust, actionable reports.

24. Can you share a To-Be diagram of how you envision the future solution?
    a. We will work with the selected vendor to map out an optimized solution based on product features available or to-be-developed.

25. What are you solving for with this RFP?
    a. Targeted communications to segmented audiences and analytics to measure the impact of these communications.

26. What's driving the evaluation?
    a. See the evaluation criteria in the RFP. Responses will be evaluated and scored based on those criteria.

27. How should one approach the two RFPs (#SPL-R-1507-MR and #SPL-R-1506) if the firm's solution offers a combination of CRM and segmentation?
    a. The two projects will be considered separately. You may submit information on how your combined solution and pricing may benefit the Library and it can be given consideration under the "Additional Capability" criteria.

28. Does the Library have a central database now?

    a. We have a mailing list which is stored in Constant Contact and is not connected to our patron database.

29. Is there a current CRM in place now? If so, what is the application?
    a. We use Constant Contact for twice monthly e-news.

30. Where does the data from the 450k customer base reside now?
    a. Outside of the CRM. Patron records are managed by Horizon Integrated Library System.

31. Is there a master "system of record" for customers?
    a. All library services are accessed via library card number and PIN, but this data is not associated with any personally identifiable information. We have the ability to pass an anonymized number (like an oAuth token) to external services.

32. Please define you definition of CRM.
    a. As stated in the RFP: The essential functions of a CRM include: customer database creation, data import and export, ability to send targeted communications based on segmentation data, and analytics of customer engagement.

33. Will there be other "use cases" from a marketing outreach perspective for sending communication to customers? Such as triggers for past dues, etc.
    a. These are not primary capabilities required, but a CRM that helps us streamline automation of communication will be considered favorably as having additional capabilities.

34. Do you expect integration to your CMS within scope of this project?
    a. For the initial implementation this is not within scope. This work may be pursued after initial implementation and would be budgeted as part of a future year's annual budget for the CRM.

35. Is it important that a vendor have experience with libraries and/or library management systems? And if so, how important is it from a selection process?
    a. This will be considered as an additional capability and scored accordingly.

36. Can you talk more about the integration requirements with BiblioCommons? Do you have internal expertise on that tool?
    a. Our IT department has expertise and will offer assistance and guidance with any third party integrations.

37. Do you expect external users (i.e. customers/patrons) to have access to the CRM system? And if so, what components do you expect them to see?
    a. No.

38. What are the data integration requirements to be accommodated for in the response? Could you please list each system to be integrated, data to be integrated (e.g., patron demographic information), and manner of integration (e.g., Ongoing feed to CRM, Bi-directional).
    a. Initially, we will simply import our mailing list and set up hooks necessary to automatically add new records (via library card sign-up and newsletter sign-up online forms). Additional integrations

will be defined during phase one as we explore options for integration with patron records.

39. What are the number of Marketing Automation (e.g., Managing and Sending bulk email) users to be utilized for the license costs?
    a. There are ~167,000 people on our mailing list and ~475,000 in our patron database.

40. Your requirements indicate an external marketing / segmentation tool or vendor will feed the new CRM system. What solution or vendor is providing this? If our solution can handle this segmentation, is that of interest to you? Should we include this in our bid?
    a. Please see our responses to questions #17 and #27 above.

41. You include requirements around integration to landing pages: Content creation of landing pages, banner ads, social posts: does the library want the integration into its existing home page or is this a new portal?
    a. We will be initiating a complete redesign of spl.org this year. The selected CRM vendor will help us determine to what extent we can integrate personalized elements in this new site structure.

42. You include integration to numerous areas (see following): are these expected to be part of each patron's record only or are you expecting these to appear when the patron accesses your home page? Or, is this a new portal the CRM solution is expected to offer?

    Integration with Programs & Campaign Channels
    i. Banner ads (content creation, ad buys, results
    ii. Web site (Personalized web content served to user profiles shared with CMS, to display custom landing pages for logged-in users)
    iii. Email (personalization, possibly dynamic content; surveys, etc.)
    iv. Events (registration, reminders, logistics, measurement)

    a. These are examples of the types of targeted communication that may be optimized using a CRM solution. As desired additional functionality, it is not expected that that full integration with such programs be part of core CRM functionality, but we would welcome proposed solutions.

End Answers to Questions

End of Addendum #1
No other items, dates, or deadlines for this RFP are changed.

Email List of Pre-Submittal Conference attendees:

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Pre-Submittal Conference for:

Customer Relationship Management (CRM) Platform & Implementation

SPL-R-1506-MR

Pre Submittal Agenda

- RFP Process Overview
- Review of proposal and scope of work
- RFP Process Overview
- Communication Guidelines
- Important Dates
- Required Documents
- Questions & Answers

Review of proposal and scope of work

- **Phase 1: Needs Identification/Implementation Planning**
- **Phase 2: Implementation**
- **Phase 3: Data integration**
- **Phase 4: Testing**
- **Phase 5: Training**

RFP Process Overview

- A need is determined at the Library and a project is developed
- Library solicits proposals to meet project goals
- Firms Propose their solution via RFP response
- Library reviews quality of response in accordance to criteria
- Best value to Library determined and a selection is made
- Library and selected respondent negotiate agreement
- Move to next best response if no agreement possible
- Execute contract and begin services

Communication Guidelines

- All communications must be through Sr. Buyer

marc.ripley@spl.org

Important Dates

- Pre-Submittal Conference   Today, August 5, 2015 1:00 PM
- Questions Due   August 7th, 2015 12:00 PM
- Submittal Deadline   August 31st, 2015 3:00 PM
- Review and Award   September – October 2015
- Negotiation   September – October 2015
- Contract & Execution   September – October 2015
- Project Start   September – October 2015

Required Documents

- Respondent Questionnaire

- Proof of Legal Business Name

- Minimum Qualifications Sheet (CRM Required Capability Matrix)

- Contract Exceptions if any

- Proposal Response Sections A - F

Proposal Response

- Qualifications

- Experience

- Proposed System Solution

- Additional Capability

- Implementation Plan

- Cost Proposal

Note: Your response is directly tied to Evaluation Criteria

How to deliver the Proposals

- Email only!
- In PDF format
- All pages must be combined into one document only
- Submit your proposals before the deadline
  - Email Title should have RFP #, Name of Project & Name of Firm in the following format:

    PROPOSAL: SPL-R-1506-MR – CRM – YOUR COMPANY NAME

RFP Document Erratum

- Procedures and Requirements 8.1
  - Registration into City Registration System

  - Web link is incorrect. The correct link is:

  https://web6.seattle.gov/FAS/OBD/NewRegistration.aspx

        Additional information is available at:
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Submitted Questions and Answers

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   We seek to replace Constant Contact. Some departments may continue to use Survey Monkey for internal surveys.

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The Seattle Public Library

Submitted Questions and Answers

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    We expect there will be both..

6. Is there an annual membership or similar which is processed through another system? Will this system be part of the data to be integrated.?

    No, there is no annual membership or similar concept.

Questions and Answers

- Questions may require extensive consideration before answering
- All official responses will be in the form of an addendum
- All questions must be in writing for inclusion in addendum
- Please type your questions in the Web meeting chat space

The Seattle Public Library