CANADIAN PARTNERSHIP AGAINST CANCER PARTENARIAT CANADIEN CONTRE LE CANCER

Request for Proposal (RFP)

RP331-2017-01

For CRM Configuration and Training

Please see the answers below regarding any questions raised in relation to this RFP.

1. **Question:**
   Is the current Dynamics CRM 4.0 deployment hosted and managed internally on the CPAC network?

   Answer:
   Yes, the current deployment is hosted and managed internally on the CPAC network.

2. **Questions:**
   Does CPAC wish to migrate to Dynamics 365 on premise or in the cloud i.e. Dynamics 365 Online?

   Answer:
   We wish to migrate to Dynamics 365 in the cloud.

3. **Question:**
   What are the current data volumes in the CRM system for major record types?

   Answer:
   As of now, the only record types we have in CRM are contact, group (i.e., marketing lists), and organizational records. The breakdown of these is approximate:

   1) 2000 active contact records (5000 inactive contact records)
   2) 200 group records (all of these groups are made up of existing contact records)
   3) 1000 organization records

4. **Question:**
   What level of customization and configuration has been implemented in the existing CRM solution and does this include any ISV solutions?

   Answer:
   The existing CRM solution mostly uses Microsoft Dynamics 4.0 software out-of-the-box. We worked with a vendor to make a few configurations and to disable a lot of the features (e.g., features related to sales). Examples of minimal configurations include renaming “marketing lists” to “groups”, linking individuals to organizations on the contact record, and creating a few custom fields on the group record. All project background will be shared with the successful Proponent, including a tour of the current CRM system, at project kick-off.

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5. **Question:**
   July 19 - DEADLINE FOR ISSUING ADDENDA & RE-SPONSES TO PROPONENT ENQUIRIES. Does this mean CPAC will only publish answers on this day for all questions received to date?

   Answer: We are publishing all the answers to all the questions received up to the proponent enquiry deadline (July 14, 2017, 3:00 p.m. local Toronto time) on July 19, 2017.

6. **Question:**
   The RFP states that the project estimate cannot exceed $200,000 *including taxes*. Can you please confirm if the project budget can be $200,000 *excluding taxes*?

   Answer:
   As outlined in the RFP, the maximum budget is inclusive of taxes. Proponents are asked to propose an approach that is aligned with the stated budget amount.

7. **Question:**
   Has the Partnership already implemented Office 365 and MS Exchange Online?

   Answer:
   Office 365 Email and Calendar and MS Exchange Online have been implemented. Other aspects of Office 365 will be implemented by the time this CRM project begins.

8. **Question:**
   Is the Partnership already using Single Sign On?

   Answer:
   Yes, the Partnership uses ADFS for single sign on for Office 365.

9. **Question:**
   Is the intention to have users access *and* perform CRM activities from their mobile phones? Or, is the intention just to provide users with access to Contacts on their mobile phones?

   Answer:
   The intention is for users to be able to access and perform CRM activities from their mobile phones.

10. **Question:**
    CR10 – Do you require an Audit Summary to be available on every single field or only key fields?

    Answer:
    We require an audit summary to be available for every single field, but we would like the ability to reduce the audit summaries to key fields in the future.

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11. Question:
CR15 – Out of the Box, Dynamics 365 provides visibility to this information in the Social Pain. To clarify, do you require a list of the interactions or do you require a summarized view showing the number of each transaction?

Answer:
For any given contact, we require the ability to view a complete list of past interactions. Additionally, for any given dissemination, we require an up-to-date snapshot of all the contacts that we have interacted with for that dissemination.

12. Question:
CR22 – Does Agresso have a solid API that can be leveraged for data integration? What CRM Stakeholder information would you like to see in Agresso?

Answer:
Agresso has a standard batch input routine for loading supplier information, as well as a DataLoad tool that can be used for batch loading certain data sets. Agresso is also capable of exporting information. In regards to the CRM stakeholder information that we would like to see in Agresso, the expectation is that the successful Proponent would help us to determine what information would be useful and feasible to see in Agresso.

13. Question:
CR24 – What does the current utilization of Igloo look like and what information is to be integrated?

Answer:
The Partnership uses a hub and spoke model for Igloo. In total, there is approximately 30 Igloo communities (some of which have several spaces within them), and about 1,900 Igloo community members. The communities and spaces consist of different member groups. The Partnership would like the CRM to track which stakeholders belong to a community or space in Igloo, which community or space they belong to, and if possible, additional information that would help us to understand how we are interacting with our stakeholders.

14. Question:
CR25 – In what format should these reports be delivered? Will presentation of reports be primarily viewed in Dynamics with the use of Power BI or other?

Answer:
The Partnership would like to be able to view the reports within Dynamics and have the ability to export reports (e.g., PDF, Excel spreadsheet).

15. Question:
Are you using Outlook to CRM integration today?

Answer:

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No. Outlook and CRM are not currently integrated.

16: Question:
How many Accounts and Contacts are in your current system?

Answer:
As of now, the only record types we have in CRM are contact, group (i.e., marketing lists), and organizational records. The breakdown of these is approximate:

1) 2000 active contact records (5000 inactive contact records)
2) 200 group records (all of these groups are made up of existing contact records)
3) 1000 organization records

17. Question:
Is the current data valid for migration or do you require a full re-implementation?

Answer:
Yes, the current data is valid for migration. There are approximately 8,200 records in total that would need to be migrated.

18. Question:
Request breakdown of current # of customized fields, entities, solutions being used to capture Account and Contact information?

Answer:
We don’t have the specific breakdown. The existing CRM solution mostly uses Microsoft Dynamics 4.0 software out-of-the-box. We worked with a vendor to make a few configurations and to disable a lot of the features (e.g., features related to sales). Examples of minimal configurations include renaming “marketing lists” to “groups”, linking individuals to organizations on the contact record, and creating a few custom fields on the group record. All project background will be shared with the successful Proponent, including a tour of the current CRM system, at project kick-off.

19. Question:
What current information is to be migrated over?

Answer:
We would like to migrate all our records over (approximately 8,200 records). The record types we have in CRM are contact, group (i.e., marketing lists), and organizational records. The breakdown of these is approximate:

1) 2000 active contact records (5000 inactive contact records)
2) 200 group records (all of these groups are made up of existing contact records)
3) 1000 organization records

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20. Question:

What is the number of activities for migration?

Answer:

We would like to migrate approximately 8,200 records. The record types we have in CRM are contact, group (i.e., marketing lists), and organizational records. The response provided in Question # 3 includes a breakdown.

21: Question:

What Stakeholder information are you currently capturing? How do you want to change this going forward?

Answer:

We are currently capturing our stakeholders' name, address, email address, phone number, fax number, organization, role, and which group (i.e., specific marketing list) they are a part of. Please refer to Appendix A (CRM and ecomms requirements document) to see what we would like to change going forward.

22. Question:

Can you provide screen shots or images of current layout of Stakeholder information?

Answer:

The current layout of stakeholder information is similar to the out-of-the-box Microsoft Dynamics 4.0 solution. All project background will be shared with the successful Proponent, including a tour of the current CRM system, at project kick-off.

23. Question:

How do you currently report on the stakeholder information? Is there a lead process qualifying stakeholders?

Answer:

Currently, the Partnership does not have any reporting functionality active. There is not a lead process qualifying stakeholders.

24. Question:

What documentation is captured from the stakeholder? How is this currently organized?

Answer:

We are currently capturing our stakeholders' name, address, email address, phone number, fax number, organization, role, and which group (i.e., specific marketing list) they are a part of. The record types we have in CRM are contact, group (i.e., marketing lists), and organizational records. Included in the requirements for this project is the ability for our external stakeholders to sign up for newsletters, select their subscription preferences and update their own information. Please refer to the ecomms requirements sheet in Appendix A (CRM and ecomms requirements) for more information.

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25. Question:
Provide Organization Chart of users and advise plan going forward?

Answer:
The expectation is that this will be provided to the successful Proponent at project kick-off. Please refer to the RFP.

26. Question:
How does communication currently flow within organization? Please provide departmental overview and flow chart.

Answer:
All relevant project documentation, including internal/external communication processes, will be shared with the successful Proponent.

27. Question:
What automated communication work flows are required to streamline interdepartmental correspondence and interaction with Stakeholders?

Answer:
The expectation is that the successful Proponent can make recommendations about which automated communication work flows are required.

28. Question:
How many e-communication templates are currently being used? How many are to be created?

Answer:
Currently, the Partnership's corporate e-bulletin template is the only one being used consistently. It is anticipated that 3 -5 templates will be created.

29. Question:
What is the current user adoption rate of customized fields? Do you require these solutions to be migrated over?

Answer:
User adoption is low and fluctuates depending on dissemination cycles. We require all solutions to be migrated over.

30: Question:
What is the current user adoption rate of the system? What is the rationale for the low user adoption rate?

Answer:

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Findings revealed that only 51% of the 65 staff members with access to CRM were regular users. Less than 50% of staff members have access to CRM. The reasons for a low adoption rate include a negative user experience with the tool, limited access to the tool, unclear processes for using the tool, unclear roles and responsibilities, the lack of user-accessible training, delays with technical support, and low confidence in the accuracy of the data.

31. Question:

What are the users main concern with current environment? What are the user's main complaint with the current environment? What recommendations have been provided from the current users?

Answer:

The main user concerns and complaints include a negative user experience with the tool, limited access to the tool, unclear processes for using the tool, unclear roles and responsibilities, the lack of user-accessible training, delays with technical support, and low confidence in the accuracy of the data. Recommendations from current users have been incorporated into the requirements document (Appendix A CRM and ecomms requirements).

32. Question:

Do you have an internal Change Management Practitioner?

Answer:

No. We don't have an internal Change Management Practitioner.

33. Question:

What does the existing CRM training program look like?

Answer:

There is currently no CRM training program in place. There is some out-of-date training materials saved on the Partnership's intranet, but most users are not aware that materials exist or where to find them.

34. Question:

How much of the project is to be completed on-site? How much of the project can be done remotely?

Answer:

This should be determined by the Proponent and included in the description of the proposed approach and work plan (Schedule E). However, the expectation is that there should be a sufficient amount of on-site consultation.

35. Question:

Has the current partner that configured CRM 4.0 been asked to respond to this RFP?

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This is an open competitive procurement process. All interested parties may apply.

36: Question:

Has the Partnership engaged the services of a Dynamics 365 partner to design this RFP?

Answer:

No. The Partnership did not engage the services of a Dynamics 365 partner to design this RFP.

37. Question:

Are there any other possible areas of recommendation? Dynamics 365 is more than Contact and Account Management System. Are you open to any other Dynamics 365 Solutions or recommendation for customizations to improve productivity?

Answer:

Please refer to the requirements document for details on configuration needs.

38. Question:

Can the Partnership provide a copy of its most recent Strategic Plan, We See Progress, The Canadian Strategy for Cancer Control: 2017-2022?

Answer:

The 2017-2022 strategic plan can be found at the following link:
http://www.partnershipagainstcancer.ca/setting-course-2017-2022-beyond/

39. Question:

Is it fair to presume, the Partnership would like to launch its new CRM system prior to its 2018 Annual Conference in order to use it for event-related communications and management? Or, is there another date driving this process?

Answer:

The Partnership does not have a specific date or event that's driving this process.

40. Question:

Internally, which departments contributed towards the development of the technical requirements for the RFP?

Answer:

We received input from across the whole organization. The requirements were informed by the Information Technology, Knowledge Mobilization and Communications departments, as well as by cross-functional users from Cancer Control and Corporate Services. An external consultant was also engaged to provide recommendations around the selection of technical platforms based on these requirements.

41. Question:

Project outcomes

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a. In Schedule A, seven outcomes are listed for this project. Does the Partnership have benchmarks for how the organization is performing against them currently and what its aiming for post-implementation? For example, the adoption rate of the existing CRM system is 20% vs. a post-implementation rate of 80%.
b. Has an internal survey been conducted by the Partnership to assess quantitatively and/or qualitatively of the current usage, attitudes, and feedback from CRM users which has contributed to the characterization of the organization's experience as a negative one?
c. If the answer is yes, can the Partnership share the survey and/or research results?

Answer:

a. The Partnership does not have any benchmarks, but it would be optimal to have benchmarks created as part of the project.
b. A current state assessment of the CRM was completed. This included an internal survey and interviews.
c. All relevant project background materials will be shared upon selection of the successful Proponent.

42. Question:

Are there any external stakeholders who will be need to be included at various stages in the development of the new CRM system?

Answer:

Only internal stakeholders will need to be included in the development of the new CRM system.

43. Question:

Ideally, when would the Partnership seek to award the contract and begin work?

Answer:

We would like to award the contract and begin work as soon as possible after the presentations/interviews. Please refer to the schedule listed in the RFP.

44. Question:

Please provide an overview of the department structure at the Partnership
How are internal communications conducted at the Partnership?

Answer:

All relevant background information will be provided to the successful Proponent.

45. Question:

What will the composition be of the project team by department?

a. Who will be the day-to-day point person at the Partnership?
b. Will the project team have the authorization to make decisions? If so, what will the estimated turnaround time be for project-related decisions? Outside from UAT

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feedback, will any other committees or internal stakeholders need to be consulted at key project milestones i.e. approval solution design documentation.

Answer:

a. A cross-functional project team has been identified. The project lead is from the Digital Strategy team.

b. The project team will be enabled to lead the project, but it is expected that the successful Proponent and project team will determine the governance model at the beginning of the project as there will be other internal stakeholders involved in key deliverables.

46. Question:

Is the Partnership familiar with Microsoft Planner? If not, which project management tool does it prefer?

Answer:

We are not familiar with Microsoft Planner. The Partnership utilizes Agresso (its ERP system) and Microsoft Project.

47. Question:

Solution designed for nonprofits, built upon Microsoft Dynamics 365.
If the proponent has an out-of-the-box system built upon the Dynamics 365 platform, which is designed for nonprofits, would the Partnership be open to align its business processes with a pre-built solution, considering the solution is highly configurable?

Answer:

The Partnership's mode of operation is different from that of a typical non-profit organization (e.g., we do not engage in fundraising activities). Please refer to Appendix A (CRM and ecomms requirements document) for details on configuration needs.

48. Question:

We believe if the Partnership is to implement a holistic stakeholder management system, it should include an events management component. Bringing your constituents back to your CRM system to complete event registrations will keep your data up-to-date and accurate.
If the proponent has an out-of-the-box solution which contained an events management module, would the Partnership be willing to implement event management as part of the project scope?

Answer:

Please refer to the ecomms requirements sheet in Appendix A (CRM and ecomms requirements). Centralized event management through our CRM system would be of interest.

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49. Question:

Adoption of Dynamics CRM 4.0

a. In the RFP, it is mentioned user adoption of Dynamics CRM 4.0 is low across the organization. Could the Partnership weight the approximate significance of each factor in terms of its contribution to low adoption? (please rate each either high, medium or of low importance)

  i. Training (lack of training, ongoing training, onboarding of new staff)
  ii. Support and change management communications
  iii. Lack of configurations to match existing business processes driven by insufficient time spent designing and understanding internal processes, therefore creating gaps in the design of the existing solution
  iv. Executive-level buy-in and internal communications

Answer:

i. Training (lack of training, ongoing training, onboarding of new staff) - HIGH
ii. Support and change management communications - HIGH
iii. Lack of configurations to match existing business processes driven by insufficient time spent designing and understanding internal processes, therefore creating gaps in the design of the existing solution - HIGH
iv. Executive-level buy-in and internal communications - MEDIUM

50. Question:

Office 365

a. Integration with Office 365 is a "must have" but can it be confirmed whether Office 365 is utilized currently, and if so, do all anticipated users of Dynamics 365 already have a corresponding Office 365 account?

Answer:

a. Office 365 Email and Calendar and MS Exchange Online are already in use. The rest of Office 365 will be implemented by the time this project starts. Thus, all anticipated users of Dynamics 365 already have a corresponding Office 365 account.

51. Question:

Section 1.10 Pricing & Timing

a. Is it correct to assume the ceiling pricing stipulation of $200,000:

i. Refers only to consulting services (both fees and expenses)
ii. Does <u>not</u> include the licensing fees for associated with ClickDimensions, Igloo, or Unit4 Business World ERP (formally Agresso)?
iii. Does <u>not</u> include licenses from Microsoft for Dynamics 365 or Office 365 (based on the assumption since the Partnership is funded by Health Canada, these licenses are given at no-charge by Microsoft Canada to federally-funded agencies/departments)
iv. If third party migration tools are needed or recommended, should these be included within the line item detail on Schedule C?

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Answer:

a. The price of $200,000 is for consulting services (fees and expenses).
b. The proposed budget does not need to include licensing fees for ClickDimensions, Igloo, Unit4 Business World ERP.
c. Budget does not include licenses for Microsoft Dynamics 365 or Office 365 as these were purchased separately.
d. Yes, if 3rd party tools are required for migration please include in the revised Schedule C.

52. Question:

Dynamics 365 Users and Licenses

a. Along with the introduction of Dynamics 365 came a new licensing model which splits users into two categories: Full user (sales, service or enterprise) and a Team member license. To help us understand how your organization is structured and the licenses required, can the Partnership list the number of users into their respective license category.

   Note: to understand the differences in these licenses please see the chart below
   - Full user (sales, service or enterprise):
   - Team member:

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SALES APP		Team Members Per User	Full User Per User
Access	Access Anywhere: Web App, Mobile App, Tablet App, via Outlook	•	•
Read	Full Read across all Dynamics 365 Applications	•	•
Team Members	Team Members Funtionality: Accounts, Contacts, Activities, Knowledge, etc.	•	•
	Custom Entities*	•	•
Edit	Sales Lead Management	See Details**	•
	Sales Opportunity Management		•
	Competitor Tracking, Sales Product Management, Sales Price Lists		•
	Sales Quote, Sales Order, Sales Invoice		•
	Marketing Lists, Marketing & Quick Campaigns		•
	Unified Service Desk		•
	Sales Goals, Sales Territory Management, Business Units, Teams		•
	Voice of Customer, Social Engagement, Mobile Offline		• (online only)
Platform	PowerApps for Sales	•	• (online only)
		$8 user/month	$95 user/month

*Actions can be performed only against records corresponding to entities included in the use rights.

**Create and Update opportunities via Portal only for non-employee or non-dedicated contractor users.

Answer:

Currently, with the use of Microsoft Dynamics 4.0, the Partnership has 2 back-end servers, 15 professional end-user licenses (super-users) and 50 basic end-user licenses. With the introduction of Dynamics 365, we would expect every employee in the Partnership to have a user license and be able to fulfill their stakeholder engagement and management needs. We also expect the successful Proponent to help us to determine the optimal number of licenses we need in each category for our users.

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53. Question:

States “see User requirements for more detail”; is there an additional requirements document or does this refer to the information listed in the RFP?

Answer:

Here are the user requirements.

	External User	Basic User	Power User/Administrator	IT Admin
Add new contacts		X	X	X
Edit/update contact information		X	X	X
Run reports		X	X	X
Import/export contacts		X	X	X
Add/edit fields			X	X
Modify main page of contacts list			X	X
Modify dashboard			X	X
Manage access (users/roles)				X
Technical maintenance and support				X
Fill out the online sign-up form for newsletters	X	X	X	X
Ability to manage newsletter subscription choices (updates or unsubscribe)	X	X	X	X
Access / Manage Newsletter subscriber’s details	X	X	X	X
Login to Newsletter tool		X	X	X
Create Newsletter templates		X	X	X
View user profiles to confirm newsletter subscription preferences		X	X	X
View/edit existing newsletter templates		X	X	X
Compose newsletters (emails)		X	X	X

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Select list of newsletter recipients based on CRM integration		X	X	X
Preview and send test newsletters (emails)		X	X	X
Send newsletters			X	
Generate reports on delivery of newsletters		X	X	X
Generate reports on newsletter subscribers		X	X	X
Run contact queries based on information fields		X	X	X
Run and save canned reports		X	X	X
Produce ad-hoc reports		X	X	X
Customize parameters of customized reports			X	X

54. Question:

Confirm whether Office 365 is already in use, and if so, has an integration to the local active directory already been configured to host single sign on to the Office 365 services?

Answer:

Office 365 Email and Calendar and MS Exchange Online are already in use and are using single sign on. The rest of Office 365 will be implemented by the time this project starts. Active Directory integration has been configured to Office 365.

55. Question:

States “see Requirements: Contact Information Stored” is there an additional requirements document? As of July, 13th 2017, no accompanying requirements which match this description exist within the RFP.

Answer:

Here are the requirements for contact information stored.

* represents a required field.

Field Label	Field Type	Field Values	CRM	eComms
*First name	Text		X	X
*Last name	Text		X	X
*Email address	Text		X	X
*Street1	Text		X	X
Street2	Text		X	X
*City	Text		X	X

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*Province	Dropdown	Pre-populate the list of values for users to select.	X	X
*Country	Text		X	X
*Postal code/ZIP code	Text		X	X
*Phone number	Text		X	
Fax	Text		X	
*Organization	Text		X	X
*Organization Type	Dropdown		X	
*Job Title	Text		X	X
*Organization CEO/lead?	Dropdown	Yes/No	X	
*How contact information was obtained	Dropdown		X	X
*Date contact information was obtained	Hidden field		X	X
*IP at time of opt-in	Hidden field	IP address		X

Fields for CRM (Proposed):

*Name of Organization CEO/Lead	Text	When a contact is connected to an organization, a field that identifies the lead of that organization
Patient/Family Advisor?	Dropdown	Yes/No
*Relationship to the Partnership	Dropdown	Partner Stakeholder End user
Program Affiliation	Checkboxes	Program team (Screening, Prevention, KMb, etc.)
Projects currently engaged on	Checkboxes	
Advisory Group Membership	Checkboxes	List: All active and previous advisory structures, including Pop Health, PCP, DCC, KMb
Area of Expertise	Checkboxes/Free Text	Programs (Prevention, Screening, KMb, etc.) Other: free text option
Jurisdiction	Dropdown	
Projects previously engaged on	Checkboxes/free text	

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Events Previously attended/KTE survey received	Checkboxes/free text	Limit checkboxes to Partnership-hosted events in the past fiscal year Other: free text option For each checkbox, add a dropdown (yes/no) for KTE survey
Knowledge Products previously received	Checkboxes/free text	List: all standard communications (annual report, SP reports, etc.); Other: free text
*Engagement preferences – method of communication	Checkboxes	Email Phone Regular post mail
Funding	Dropdown	Funded partner Non-funded
*Target audience segment	Dropdown/multiselect (in some instances)	Policy Specialist Health System Administrator Health Care Professional Researcher Patient Public
*Contact owner	Free text	Program Team/Staff Member
Fields for eComms Tool (will appear on sign-up form along with basic contact information above)		
* Language Preference	Radio button	English /French
*Topics of Interest	Multi-Select	This list of options will be provided and will include: Screening, Prevention, System Performance Data, Employment Opportunities, etc. *Note: This is a future-state field and will need to be refined.*
*Interested in attending events?	Yes / No *This will include conditional logic	This information will allow the use of segmentation in CRM *Note: This is a future-state field and will need to be refined.*

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	If Yes is selected then a multi-select will appear	
*What types of events are you interested in attending?	Multi-select	This list of options will be provided and will include: In-person, Online, Both in-person and online *Note: This is a future-state field and will need to be refined.*
*CAPTCHA	Checkbox or question to be answered	Implement Google reCAPTCHA for bots?
*Confirmation of consent	Checkbox	Example: I consent to receive electronic messages that will keep me informed about the latest Partnership news, reports, opportunities, and events.

56. Question:
Please list the version the Partnership has of Unit4 Business World ERP (formally Agresso); and is it possible for you to provide your Unit4 account manager information as development of this feature requires collaboration with Unit4.

Answer:
We use Unit4 Business World Milestone 4. It will be possible to connect the successful Proponent with our Unit4 account manager.

57. Question:
Can you confirm the Partnership is using Igloo Software Enterprise edition?

Answer:
Yes, we are using the Enterprise edition of Igloo.

58. Question:
Is there an estimated number of templates or types of surveys which will likely need to be developed?

Answer:
We estimate that 5 types of surveys will need to be developed.

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59. **Question:**
Will graphic design support be required to generate the assets required to put the templates together (questions apply to several templates etc.)

Answer:
Graphic design support will be required for creation of the templates.

60. **Question:**
Is there an estimated number of templates required for your email campaigns?

Answer:
It is estimated between 3 to 5 templates will be created.

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