

Request for Proposals

Customer relationship management (CRM) system customization and implementation consulting services

New Orleans Business Alliance (“NOLABA”), a non-profit, is requesting proposals for a long-term Customer Relationship Management (“CRM”) consulting, customization and implementation services contract. All quotes and proposals should be submitted to: Attn: Stephanie Bell 1250 Poydras Street, Suite 2150, New Orleans, LA 70112. One (1) electronic copy in PDF format to sbell@nolaba.org and at least one (1) hard copy must be submitted to the above address. Both versions are due by 5 p.m. Wednesday, June 12, 2019. NOLABA reserves the right to accept or reject any and all proposals and/or any portions of proposals.

All documents submitted are subject to the Louisiana Public Records Act (La. R.S. 44:1 et seq.). Any emails sent or received by Organization employees are potentially subject to these laws. Unless otherwise exempted from the Public Records Act, senders and receivers of Organization email or other records should presume that all information sent are a matter of public record, and are therefore subject to public inspection upon request. To comply with the Public Records Act, the Organization keeps all hard documents and electronic correspondence in accordance with its Document Retention Policy.

Costs and Ownership of Proposals

All materials submitted in response to this request become the property of NOLABA. Selection or rejection of a proposal does not affect this right. All proposals submitted will be retained by NOLABA and not returned to Proposers.

All costs directly or indirectly related to preparation of a proposals responding to this RFP, any oral presentations required to supplement and/or clarify a proposal, and any reasonable appearance which may be required by NOLABA in connection with this Request for Proposal, shall be the sole responsibility of the Proposer, and shall not be reimbursed in any manner by NOLABA.

Validity of Proposals

All proposals shall be considered valid for acceptance until such time an award is made, unless the Proposer provides for a different time period within its proposal. However, NOLABA reserves the right to reject a proposal if the Proposer’s time period is unacceptable and the Proposer is unwilling to extend the validity of its proposals.

Confidential Information

Only Information which is in the nature of legitimate trade secrets or non-published financial data may be deemed proprietary or confidential. Any material within a proposal identified as such must be clearly marked in the proposal and will be handled in accordance with the Louisiana Public Records Act, R.S. 44:1-44 and applicable rules and regulations. Any proposal marked as confidential or proprietary in its entirety

may be rejected without further consideration or recourse.

An inquiry period may be set. In that event, it will be firmly set for all interested Proposers to perform a detailed review of the RFP documents and to submit any written questions relative thereto. *Without exception*, all questions MUST be in writing by an authorized representative of the Proposer and received by the close of business on the Inquiry Deadline date set forth in the Schedule of Events. Inquiries shall not be entertained thereafter. Answers to questions that change or substantially clarify the RFP shall be issued by addendum and provided to all prospective Proposers.

NOLABA reserves the right to change the calendar of events at any time. NOLABA also reserves the right to cancel or reissue the RFP at any time and for any reason. If the Proposer needs to submit changes, addenda or withdrawals, a written request signed by an authorized representative of the Proposer, cross-referenced clearly to the relevant proposal section shall be submitted prior to the proposal opening, in a sealed envelope. Changes or addenda shall meet all requirements for the proposal.

NOLABA reserves the right, at its sole discretion, to waive administrative informalities contained in any proposal. Issuance of this RFP in no way constitutes a commitment by NOLBA to award a contract. NOLABA reserves the right to accept and reject any or all proposals, or to cancel this RFP if in the best interest of NOLABA to do so. NOLABA also reserves the right to refuse to enter into an agreement with a proposer after selection if the parties cannot agree on the terms of the contract.

Additional information may be obtained by contacting the New Orleans Business Alliance at 504-934-4500 or sbell@nolaba.org.

Submittals that are incomplete, unclear, or fail to comply with the requirements as outlined in the instructions, may be rejected.

OPPORTUNITY DESCRIPTION

A. Description of Entity

The New Orleans Business Alliance (NOLABA) is the official non-profit organization tasked with leading economic development initiatives for Orleans Parish. We are a public-private partnership between the City of New Orleans, the business community and private investors. Our foundation and Board of Directors were announced on August 13, 2010. Our 17-member Board is composed of a cross-section of New Orleans leaders including the Mayor and a diverse group of business leaders.

The New Orleans Business Alliance carries out key responsibilities as delineated in our Cooperative Endeavor Agreement with the City of New Orleans:

- Brand/reposition New Orleans. Our vision currently sees New Orleans as the next great American city for business investment, and the perfect intersection of culture and commerce, where quality of life and inclusive economic security is available for all.
- Attract new business and investment to New Orleans, and grow existing business.
- Build, coordinate and expand the local Small Business Ecosystem by providing leadership, tools and information to assist local business owners.
- Facilitate workforce and talent development training programs, and grow those programs to reach, graduate and connect more participants.
- Promote the city and state economic development assets and incentives.
- Convene and work with local economic development partners.

We view our mission to unite a diverse community of stakeholders to attract new business, catalyze local business and job growth, create wealth through small business development and workforce development, and build an equitable and sustainable economic future for New Orleans as critical to the city's future.

B. Scope of Solicitation

Overview

The New Orleans Business Alliance invites proposals from vendors for a Customer Relationship Management (hereinafter CRM) Solution. This solution includes software and professional services for software customization and implementation, and project management.

Proposals must be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of this Request for Proposal (RFP). Emphasis should be on completeness and clarity of content with sufficient detail to allow for accurate evaluation and comparative analysis.

The CRM Project will enhance customer service and efficiency through the use of digital and interactive technologies, as well as provide a common point of origin for all service requests. The Project will retool business processes and integrate knowledge base, work order, and other systems into a more streamlined and effective manner.

Project Vision Statement

The CRM Project will increase the Business Alliance's responsiveness and accessibility through offering enhanced customer service and service delivery to all who conduct business with the Business Alliance.

Project Goals

- Expand operational effectiveness and productivity
- Empower Business Alliance departments to improve their customer service delivery
- Augment accessibility and quality of information for decision-making support
- Retool or replace inefficient customer relationship practices
- Achieve consistency in addressing inquiries
- Enrich collaboration and interdepartmental communication
- Provide a means of measuring effectiveness
- Develop comprehensive reporting capabilities

Project Objectives

Integrate a centralized approach that will:

- Specify and track call flows
- Retire outdated legacy and back office systems and tools
- Approach decisions holistically, developing project policies, systems and solutions with the participation of representatives from all departments and divisions
- Develop ongoing training programs so that all Business Alliance personnel are knowledgeable about the system
- Commit staffing and other resources to ensure the success of the project during development, implementation and after installation

A CRM solution is a combination of technology, processing efficiencies, consistent and effective communication and a defined customer service approach. These factors result in efficient and customized level of service.

During the last quarter of 2018, The Business Alliance started rigorously investigating CRM solutions as a component of this project initiative. The intention was to upgrade internal systems to coincide with other projects that the Business Alliance is pursuing. Providing exceptional levels of customer service has consistently been a cornerstone of the Business Alliance since its founding, and Business Alliance leadership believe that a CRM system would be a natural extension to help maintain the same levels of service.

In October 2018, Business Alliance Leadership approved the formation of a CRM Committee. In December 2018, the committee, conducted a comprehensive Needs Assessment to research the use of processes and technology. Interviews with more than 20 personnel in all Business Alliance departments were conducted. As a result, key opportunities for improvement were identified.

The Business Alliance leadership, and key Board members strongly support the need for a CRM solution. The Board will be updated and asked for authorization to continue moving forward once the qualified proposals have been reviewed by the CRM Committee. After the selected vendor's finalized statement of work has been completed, it will be presented to the Board for final approval and contract authorization.

The Business Alliance has decided to pursue a phased implementation approach. The Phases include:

Phase 1: With work ending in 2019

- Investor Relations Team
- Business Attraction & Retention Team
- Small Business Ecosystem Development Team
- External Relations & Policy Team

Phase 2: With work ending in 2020

- Place Based / Strategic Neighborhood Development Team

Phases 3: With work ending in 2020

- Grants Management Team
- Finance Team

The consultant(s) will work directly with Business Alliance team members, to build out a CRM system. The consultant will coordinate and facilitate regular meetings of the working group, produce an assessment report and recommendations to guide future implementation.

Key Deliverables

- Assessment of processes and customization of CRM tool:
 - The consultant will provide facilitation support to a working group comprised of department leads to define processes that will be performed in CRM tool.
 - The Consultant should aide in the development of a tool, coordinate, and structure the tool.
 - The consultant will develop a final report that summarizes the findings of the working groups and a customization and implementation plan
- Recommendations for future implementation:
 - Based on the assessment report, the consultant will compile a list of recommendations and priorities for the next plan implementation.
- Configuration
 - Based on NOLABA's needs, Consultant will build functionality including custom calculations, triggered actions, workflows, and more.
- Implementation and Training
 - Consultant is responsible for implementing the customized software and training NOLABA staff to utilize it to its fullest potential.

SUBMISSION REQUIREMENTS

Proposals should not exceed 10 pages, excluding examples in an appendix, and must include the following information:

Contact Information

- Respondent's Full Name, Address, Federal Employer Identification Number



1250 Poydras St, Suite 2150 New Orleans, LA 70112
504.934.4500 www.nolaba.org

- Primary Contact's Full Name, Telephone Number, Email Address
- 3 references for similar work

1. Methodology and Work Plan

- Respondents should clearly delineate their methodology and work plan, including key dates and resources needed for achieving the expected outcomes.
- Respondents should outline key deliverables and metrics for success

2. Statement of Qualifications & Requirements to Perform Duties

- Respondent should provide information demonstrating the background and qualifications to carry out the scope of work. Specific examples of prior work in line with this scope should be outlined.
- Respondent should provide the following as examples of their past work:
 - a. Meeting summary report,
 - b. Final narrative report, and
 - c. PowerPoint presentation.
- Please list all technical capabilities and any other skill sets needed to carry out the scope of work.

3. Budget Summary and Fee Schedule

4. References

- Provide full names, addresses, and phone numbers for up to three past-client references capable of explaining and confirming Respondent's capacity to successfully complete the project referenced in this proposal. NOLABA staff may contact these references or industry sources, investigate previous projects and current commitments, interview some or all of the proposed team members, and take other information into account in its evaluation of the responses, including contacting individuals not listed explicitly as references.

5. DBE Participation

- Respondent should list DBE qualifications, or plan for equivalent inclusion of 35% DBE contractor participation.

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