



# **Request for Proposal Customer Relationship Management Software (CRM) Development and Support**

## **Purpose of Request for Proposal**

Better Business Partnership (BBP) is a joint Council initiative funded by Ku-ring-gai, North Sydney and Willoughby Councils. The program aims to support and assist local small and medium business owners and operators to improve the sustainability performance of their business in order to save money, improve social outcomes and to reduce their impact on the environment.

BBP currently utilises Microsoft 365 Dynamics CRM to manage its customer database of over 1200 active accounts including interactions with its stakeholders such as calls, emails, meetings and tasks. The CRM is also used in core service delivery through tailored extensions such as accreditations and scoring and the recording and reporting on the business sustainability actions and outcomes.

Since the current CRM solution was implemented, the BBP program has undergone significant operational change. There are instances of historical data and fields that are no longer used and new processes require replacement fields and data collection.

The BBP Program currently utilises an online appraisal provided via a third party provider Brilliant Assessments. The results of the assessment by BBP members and any updates, reappraisals, action plans and allocation of reward badges need to be stored and accessible by BBP team members.

The BBP CRM solution requires significant work to tailor it to the current and emerging requirements of the program. Ku-ring-gai Council, as the host Council for the Better Business Partnership (BBP) project seeks pricing from suitably qualified and experienced contractors to undertake software development work either:

- (a) to further customise the current Microsoft Dynamics 365 Customer Relationship Management (CRM) to the requirements of the BBP Program and its officers; or
- (b) To suggest alternative cost effective and integrative solutions which are seamless to implement and not cost prohibitive to resolve the operational and user issues currently faced by the BBP team.



The aim of the development work is to improve user experience, functionality and reporting capabilities to assist in enhanced service delivery. The successful contractor will work collaboratively with BBP and the relevant Council IT staff to understand the needs, priorities, and desired outcomes of the BBP program and design solutions to meet these.

BBP is funded on a 3 yearly rolling basis by the partner councils. This contract will be for the remainder of the BBP Phase 4 from engagement until 30 June 2023, with an option to negotiate an extension of the term provided certain criteria are met. The successful contractor will therefore need to be easy to work with, responsive and provide timely ongoing support and maintenance to the BBP team to ensure a positive experience in working with this critical information technology system which underpins the effectiveness of the BBP program.

## SCOPE OF WORKS – Section 1 Online Assessment and Report Generation

The goal of section 1 is to move off reliance on the Brilliant Assessment third party platform by building an assessment functionality with in-built scoring and report generation functions within the BBP CRM IT environment so that every question and response is recorded fully within the CRM environment for data analysis and reporting.

	Service/Feature	Requirement
1	Build an online assessment functionality into the CRM environment	<ul style="list-style-type: none"> <li>• Build an alternative assessment (based on BBP’s drafted question set see Excel attachment) direct into the CRM ecosystem linking directly to the current CRM</li> <li>• A separate web page to be designed for each section with questions and responses for each category</li> <li>• Integration of online assessment and report generation with BBP member accounts housed within the CRM</li> <li>• The BBP assessment contains 10 sections.               <ul style="list-style-type: none"> <li>○ Business contact and demographic information</li> <li>○ Business Health</li> <li>○ Energy</li> <li>○ Water</li> <li>○ Waste</li> <li>○ Single Use Plastic</li> <li>○ Community</li> <li>○ Staff</li> <li>○ Transport</li> <li>○ Purchasing</li> </ul> </li> <li>• Note the question and responses/scoring of the current assessment format is dictated by the limitations and structure of the 3<sup>rd</sup> party platform. If you want to test the assessment in action go to <a href="http://www.bbp.org.au/assessment">www.bbp.org.au/assessment</a></li> <li>• Simplification of the assessment questions and answer format would be desirable without changing the underlying format and report outcome for BBP business clients. Recommendations and suggestions for</li> </ul>

		<p>simplification are invited and will be assessed favourably in the RFQ</p>
	<p><b>Storing and Recording of responses, scores</b></p>	<ul style="list-style-type: none"> <li>• Responses, scores for responses and overall rating for each section of the assessment to be recorded in the relevant business account stored of the CRM.</li> <li>• Restructuring and re-designing new templates, questions, and responses based on the Brilliant Assessments format in Dynamics CRM.</li> <li>• Where assessment scores are recorded in the CRM, have the ability to add notes or amend, as the business puts the recommended actions in place</li> <li>•</li> </ul>
		<ul style="list-style-type: none"> <li>• Creation of a new form incorporating the current “Bye Bye Plastic” pledge which is a web based form. We currently have to enter the info in two different places. Need to have an automated PDF emailed to the business for them to display – need to integrate within the CRM assessment solution</li> </ul>
		<ul style="list-style-type: none"> <li>• Implementing BBP internal user permissions inside the organization. Internal users will get access to all the forms of assessments, accounts, contacts, action items, and activities in the CRM</li> </ul>
	<p><b>Generation of feedback Reports in Word and PDF format downloadable and emailed to business clients and BBP staff</b></p>	<ul style="list-style-type: none"> <li>• A feedback report to be automatically generated based on based on responses and scores from the online assessment in the format of a template to be provided by BBP called the “BBP Sustainability Report” and Action Plan and ability to be manually amended in the CRM by BBP staff. Examples are included as attachments to this RFQ,</li> </ul>
	<p><b>BBP Business Clients able to access their assessment and action plans via secure password and amend/update</b></p>	<ul style="list-style-type: none"> <li>• The solution requires the ability of BBP business respondents to the assessment to be able to access their own assessment within the solution via secure password by implementing external to BBP users’ permissions (external users); External users will get access to the forms of assessments in the Portal. They can see their previous assessment and their action items and can update Action Items themselves as they complete actions</li> <li>• Businesses to be able to access to see their scores and have the ability to submit new information, that would then go through a BBP PM approvals process to validate and be applied to their score or not</li> </ul>
	<p><b>Online assessment features required</b></p>	<ul style="list-style-type: none"> <li>• scores for each response to be calculated in each category to determine whether badges are awarded</li> <li>• Creating follow-up reminders</li> </ul>



		<ul style="list-style-type: none"> <li>• Calculating the final score of each assessment</li> <li>• Generating a reminder to the BBP Program Manager and business to undergo re-accreditation / reassessment process annually</li> <li>• Reminders to business and BBP PM's re Action Items that are becoming due and overdue</li> <li>• The business respondent will access the online assessment through the website/URL</li> </ul> <p>Ability to send email links to business respondents direct to online assessment page and to redirect any queries back to specific BBP PM/Program Coordinator emails. IE allocate specific contact emails to specific groups of businesses – All businesses which are categorised as Kuring-gai Businesses to <a href="mailto:MFredman@kmc.nsw.gov.au">MFredman@kmc.nsw.gov.au</a> for example</p>
	<b>Online assessment processes</b>	<ul style="list-style-type: none"> <li>• Implementing processes, including:</li> <li>• Generating the questions from the questions' template forms</li> <li>• Generating the responses from the responses' template forms</li> <li>• Generating a feature that enables the external users to complete their assessment with status save as draft (if by any reason the user was unable to complete the assessment in one go, their form will be saved and the rest of the assessment details can be done later. An ability to send an automated and manual email with link back to the unfinished assessment is required)</li> </ul>

## Section 2 – Improve User Interface and Usability – Address Specific Historical Issues

	<b>Specific problems identified by the BBP team</b>	We have a list of current specific user difficulties and issues that have been raised with previous CRM consultants but have not been resolved. These include as detailed below:
	<b>Email integration into CRM</b>	<ul style="list-style-type: none"> <li>• Easier uploading or tagging of emails by and from BBP program managers emails and desktops to business customers into their CRM Account. We formerly were able to tag and automatically upload emails into the CRM into the relevant business account to which they related through 365 email integration. These were recorded as Activities.</li> <li>• Now we have to save emails to desktop and attach them manually as a Note. We seek this auto upload function to</li> </ul>

		be reinstated or a simple and easier process to be identified.
		<ul style="list-style-type: none"> <li>• Overall simplification of user dashboard. Currently when we open the CRM we are faced with a multitude of options and have to select a specific set for different users. We want a unified simplified Dashboard that is tailored to the BBP user experience. For example, when I open the CRM I always have to select Active Accounts/All Accounts. Unnecessary and time consuming/confusing steps to get to required information.</li> <li>•</li> </ul>
		<ul style="list-style-type: none"> <li>• Date stamping of emails/notes/activities and other entries in the Account section for each business entry are currently not chronological and do not reflect actual date of the entry. Instead, the date reflects the last administrator change which makes it difficult to find and date previous correspondence by BBP staff predecessors.</li> <li>•</li> </ul>
		<ul style="list-style-type: none"> <li>• Changing of existing field names or deletion of unnecessary field. For example BBP Rego Date – this was relevant until 2019 now we need to either change the name of the field to make it relevant or delete it/archive it.</li> <li>•</li> </ul>
2	<b>BBP reporting functions in CRM</b>	<ul style="list-style-type: none"> <li>• Currently there are a multitude of obsolete reports in the CRM</li> <li>• We need centralisation of reports in one section of the CRM and pre-set reports that can be downloaded and updated manually by the user</li> <li>• The current Advanced Find way of searching and building reports in the Microsoft Dynamix CRM is too complicated so simplification and reduction of options is desirable for simpler and more customer-centric usability</li> <li>• Ability for BBP PM to build and print a summary Report by selecting key information about the business client in summary form</li> </ul>

### Section 3 – Licenses, CRM Maintenance Support and Training

	<b>Microsoft Licences</b>	<ul style="list-style-type: none"> <li>• This contract is to include provision of all necessary Microsoft licences for BBP users.</li> <li>• Costs for each licence type to be detailed and invoiced monthly or quarterly</li> <li>• Additional users to be agreed and implemented upon request by BBP Program Coordinator</li> </ul>
--	---------------------------	---



3		•
	<b>CRM customer service desk</b>	<ul style="list-style-type: none"> <li>• The BBP Program Managers need a process to log CRM difficulties and user issues directly with a CS Desk with set SLA's for response</li> </ul>
	<b>Training</b>	<ul style="list-style-type: none"> <li>• Proposal to include 10 hours of training sessions for BBP Program managers and new staff per annum.</li> <li>• Proposal to include making of short training videos with screen capture and notes via LOOM or similar screen capture software on all key user areas for BBP staff.</li> </ul>

## Program Management and Administration

1. Your main point of contact with BBP will be the Program Coordinator Amanda Choy.
2. Needs analysis check in with BBP team (1 hour zoom session with team)
3. Weekly progress updates – sent in email format on Friday to [achoy@kmc.nsw.gov.au](mailto:achoy@kmc.nsw.gov.au)
4. Progress online updates – weekly or fortnightly to begin with as agreed with Program Coordinator.

## Response to the Brief

In preparing a response to this RFP, the applicants should concisely detail:

1. **Understanding of the Brief** – submission to demonstrate a clear appreciation for the task and elements required by the Brief to the deliver the required outputs;
2. **Proposed approach** – proposed methodology and indicative project and action plans including recommended sequencing and requirements from both the consultant and BBP / Council staff;
3. **Relevant experience** qualifications and location of the personnel to be involved in project and their experience in undertaking customisations within Microsoft CRM 365;
4. To the extent possible an **itemised proposal of work/ hours and cost** as described per table 1.

### 5. Professional Support and Development Hours

Hourly rates for additional support and development work if required, and/or options to pre purchase blocks of professional support and development work.

## Proper and Ethical Practices by Consultants



Consultants will seek to achieve best practice standards in their industry and will demonstrate this in the fulfilment of their contract.

Consultants will act honestly and ethically. For example they will:

- Disclose any conflicts of interest and will not seek to undermine fairness and impartially on the part of Council.
- Submit bids only when they have a firm intention to proceed.
- Not engage in practices such as collusion in bidding, inflation of prices to compensate unsuccessful proponents, hidden commissions or other such secret arrangements.
- Comply with State and Commonwealth legislation including the trade practices and consumer affairs laws.

## **Submission of Your Proposal**

The closing date for submissions is **Monday 9 August at 4pm.**

Submissions should be submitted electronically via [info@bbp.org.au](mailto:info@bbp.org.au) and emailed to [Achoy@kmc.nsw.gov.au](mailto:Achoy@kmc.nsw.gov.au)

Electronic submissions and or attachments should ideally be in Microsoft Word (.doc) or Adobe Acrobat (.pdf) format and should not exceed 5 megabytes.

### **Further Information**

Further information in relation to the proposed project may be obtained from:

Amanda Choy  
Program Co-ordinator  
Better Business Partnership  
9424 0912