



Dynamics 365 Implementation Services

RFP #19-101

Addendum 1 Questions and Answers

1. Please confirm can we perform the task offsite/offshore?
 - § Some on-site work may be required.
2. Please specify if meeting/services/training/support is to be performed on-site or off-site?
 - § Some on-site work may be required. Please indicate expected travel costs in your pricing/budget document.
3. Please specify if any private firm experience and past performance be considered for this project?
 - § Private firm experience is not required.
4. Please confirm how many references require for this project? can we submit references with any combination?
 - § No minimum references are required.
5. Please specify is there any hardware & maintenance requirement?
 - § There is no hardware and maintenance requirement.
6. Please confirm if there any licence or certification is require?
 - § There are no license or certification requirements for software. There are insurance requirements per the RFP specifications.
7. How many personnel would be required for this project and what are the title?
 - § There is no requirement for a specific number of staff. Bidder should indicate the

number of staff expected to complete the work.

8. Please confirm this RFP for new development and maintenance for Dynamics 365 & CRM tool including Access/SQL Server/SharePoint skill-sets?

§ There is no requirement for Access/SQL Server or SharePoint development and maintenance.

9. What is the approximate award & start date of this project?

§ The start date for this body of work is expected to be on or about December 1, 2018. Proposals should indicate expected timeframe to complete Essential components, plus any Optional components, described in the RFP.

10. What is the period of performance of this project?

§ The start date for this body of work is expected to be on or about December 1, 2018. Proposals should indicate expected timeframe to complete Essential components, plus any Optional components, described in the RFP.

11. Please specify if there is any budget for the project?

§ Bidders should indicate price according to the implementation plan described in the RFP.

12. Does CREC intend the Dynamics 365 installation to be On-Premises or Online?

§ Online – 365 Cloud hosted

13. How many users will use this system? If known, how many licenses does CREC anticipate purchasing, and which types of licenses (e.g., Enterprise, Professional, etc.)?

§ Estimated: 40 Enterprise licenses; 140 Team Member licenses

14. Will any external users need to access the system?

§ Customers may be asked to provide feedback on services; however, we do not anticipate a need for customers to have licensed accounts at this time.

15. Is content migration from legacy systems in scope?

§ Some data (e.g., customer profile data, employee data, etc.) will need to be entered into the system; however, legacy sales data / contracts will not be migrated.

16. What is the typical volume of data and transactions performed by CREC?

§ Roughly 750 contracts annually.

17. What kind of data would need to be captured utilizing the mobile app?

§ We would prioritize features of a mobile app in the following manner:

§ Service providers to see assigned contracts / projects

§ Service providers to report / track progress on assigned contracts / projects

§ Service providers see unassigned contracts / projects

§ Service providers respond to unassigned contracts / projects according to their availability / capability

18. Does CREC have a target start date and completion date for the project?

§ CREC would expect some aspects of the project (e.g., planning & coordination) to begin shortly (not more than a month) after awarding the contract, on or about December 1, 2018. Ideally, prioritized features would be usable by March 2019 and the majority of build out completed by June 30, 2019. Training / Documentation may occur as late as Fall 2019.

19. Please provide additional details on required integrations: In the MUNIS integration, will documents need to be passed in addition to data?

§ Not in current plans. Data should be passed without document uploads / creation.

20. Integration with a Financial System is mentioned in RFP. What type of Financial System does CREC have? Does this system have adapters already built in for MS CRM? What type of integration is required?

§ CREC uses Tyler Technologies MUNIS. Most import / export is handled via Excel; however, their platform has some APIs.

21. Does CREC require integration of the CRM with any other applications, such as those mentioned in the RFP (e.g., Access, SQL Server, SharePoint).

§ Potential integration with SharePoint or AD

§ SharePoint - save reports, formatted contracts, etc. (Word / PDF / excel) to SharePoint

§ AD to populate user data

22. Is integration with a CTI/IVR in scope for this RFP? If yes, can you name the CTI/IVR system in place?

§ Not in current plans.

23. What is CREC's current email system?

§ Microsoft Exchange – mix of locally hosted and cloud based 365

24. Does CREC have a detailed list of requirements that can be provided as part of the RFP documentation? If not, could CREC provide some additional high level information on the requirements to help determine what modules may be a better fit for CREC (project Service or Field Service)?

§ No additional information will be provided at this time.

25. Has CREC decided that Project Service is the module to be used or can the solution comprise of Field Service?

§ No decision has been made.

26. Is there a need to track services long term (more than a year)?

§ Yes, CREC Resource Group could potentially deliver services over the course of more than one fiscal year.

27. Does CREC provide progress billing or consolidated billing to its providers?

28. Are the quotes given for the services to be provided, estimated in hours or dollar amounts?

§ Quotes should always include dollar amounts

29. Would CREC consider an extension for the due date of the RFP response?

§ Not at this time; proposals are due at 11:00 AM on October 10, 2018.

30. Which partner worked with CREC to put the RFP together?

§ CREC developed and issued the RFP.

31. Which partner provided the demo so that you were able to determine that Dynamics 365 is the right solution for the agency?

§ CREC will not share this information prior to evaluating RFP responses.

32. How many and what type of each Dynamics licenses are being used for this effort?

§ Estimated: 40 Enterprise licenses; 140 Team Member licenses

33. Are there funds allocated for this project? If so, can you share a rough range of what has been allocated?

§ CREC Resource Group does have funds allocated for this project. The amount will not be shared at this time.

34. There is a mention that Dynamics 365 will replace other applications in use today. Does existing data from those platforms need to be migrated into Dynamics? If so, are there specifications available? If no specifications are available but there is a need to migrate data, what guidance do you have for delivering a fair scope of work?

§ Some data (e.g., customer profile data, employee data, etc.) will need to be entered into the system; however, legacy sales data / contracts will not be migrated.

35. Does the CREC have projected workflows for Leads, Opportunities, etc., available for review, or is the CREC relying on the selected vendor to provide consulting?

§ CREC Resource Group has draft workflows, but expects feedback and guidance from the selected vendor.

36. Has CREC assigned internal resources to manage this project? Please provide titles for individuals on that team.

§ CREC has internal resources assigned to this project but will not be sharing individual titles and roles before the RFP is awarded.

37. We are a Microsoft Cloud Services Provider, which means we can provide a quote for Dynamics Licenses. Does CREC have a current EA from Microsoft & is the CREC willing to purchase licenses from a CSP?

§ CREC Resource Group already has quotes for anticipated licenses.

38. Is the CREC an Microsoft O365 customer? If yes, what types of licenses do you have and how many?

§ Yes. Estimated: 40 Enterprise licenses; 140 Team Member licenses.

39. Is the CREC using Azure at this point in time?

§ CREC Resource Group makes limited use of Azure.

40. What is the estimated term of the contract?

§ CREC would expect some aspects of the project (e.g., planning & coordination) to begin shortly (not more than a month) after awarding the contract, on or about December 1, 2018. Ideally, prioritized features would be usable by March 2019 and the majority of build out completed by June 30, 2019. Training / Documentation may occur as late as Fall 2019.

41. When is the project Award date?

§ CREC would expect some aspects of the project (e.g., planning & coordination) to begin shortly (not more than a month) after awarding the contract, on or about December 1, 2018. Ideally, prioritized features would be usable by March 2019 and the majority of build out completed by June 30, 2019. Training / Documentation may occur as late as Fall 2019.

42. When is the project scheduled to get started? Any tentative start date?

§ CREC would expect some aspects of the project (e.g., planning & coordination) to begin shortly (not more than a month) after awarding the contract, on or about December 1, 2018. Ideally, prioritized features would be usable by March 2019 and the majority of build out completed by June 30, 2019. Training / Documentation may occur as late as Fall 2019.

43. What is the primary place of performance (Onsite/Offshore)?

§ Some on-site work may be required.

44. Can you please share the incumbent information?

· N/A