**Organizational Assessment of CRM Readiness Question & Answer 2**

The Question and Answer period closed January 4, 2019.

1. What current systems and tools are used by staff that interact with agency customers?

**Commerce answer: We have several (3-4) outward-facing applications that customers use.**

1. Approximately how many staff members of the 310 are estimated to interact with agency customers?

**Commerce answer: Approximately 50%.**

1. Is there currently a CRM Executive Steering Committee and if so, who are the members?

**Commerce answer: No.**

1. Is there an assumption that the CRM solution will also perform grant management functions?

**Commerce answer: Not at this time.**

1. How did you arrive at the time required for this project?

**Commerce answer: Based on similarly scoped projects at other agencies.**

1. How did you arrive at the budget for this project?

**Commerce answer: Based on similarly scoped projects at other agencies.**

1. Can the budget be flexible for a higher quality work product?  If so, how would you like to see the multiple options you would have to increase the value and content of a final report?

**Commerce answer: No.**

1. For such a small budget project, why are you specifying in-person oral presentations? (In our experience, this is usually a practice for multi-million dollar projects)

**Commerce answer: We require interviews, not presentations. There are questions we want ask in person of each qualified bidder. Skype meetings can be arranged if in-person attendance is not possible.**

1. Does the agency have well documented business processes that relate to the project subject areas?

**Commerce answer: Yes – not consistently throughout all business areas.**

1. Are there any recent satisfaction surveys of some / all of the 3,800 customers relative to agency performance?

**Commerce answer: Yes.**

1. Are there current assessments of the 100 programs the agency manages?

**Commerce answer: No assessments tied specifically to CRM implementation.**

1. You use the term CMS to identify a system but do not spell out the functions of the CMS system or the current implementation.  We assume that you mean content management system.  Can you please clarify?

**Commerce answer: Contract Management System - this is the agency’s central business system that manages contracts with our customers. It is primarily an internal system comprised of accounting, budget, and contract monitoring functions. It is expected that aspects of CMS be integrated with a CRM solution.**

1. Do you currently have an ERP system implementation?

**Commerce answer: No.**

1. What is the size of your senior management team?

**Commerce answer: 11**

1. Does the agency currently have a help desk function?

**Commerce answer: Yes.**

1. Does the agency currently have a training function?

**Commerce answer: Yes, for state required training and some internal training.**

1. Does the agency (or a peer agency) currently have a change management practice?

**Commerce answer: Yes.**

1. Could you please provide for a detailed Organization Chart of Commerce?

**Commerce answer: This document has been uploaded to WEBS and the Commerce website separately.** [**It can be downloaded here.**](http://www.commerce.wa.gov/wp-content/uploads/2013/01/Commerce-orgchart.pptx)

1. Does Department of commerce has organization change management framework and team in place?

**Commerce answer: Yes**

1. Is there any documentation around currently executed list of core CRM functionalities and process work flows which assessment team can leverage?

**Commerce answer: No.**

1. What is the current CRM solution/tool? and are they integrated with other systems (if any) and their purpose? any documentation?

**Commerce answer: We do not currently have an enterprise CRM solution.**

1. How campaign management, donations management/fund-raising is being done currently, any tools/solutions used (if any)?

**Commerce answer: Commerce does not do any campaign, donation, or fund-raising functions, or management thereof.**

1. Does Department of commerce has PMO and respective defined project management methodologies, templates, tools and process?

**Commerce answer: Yes.**

1. List of identified stakeholder’s role and their count will be helpful to gauge the assessment session, interviews, workshops, trainings, communication channels for effective & efficient discovery.

**Commerce answer: This information would be included as a part of the project kick-off.**

1. Section 1.6 states that “Any vendor contracted to produce the deliverables as a result of this RFP will not be eligible to perform systems integration work related to any subsequent CRM effort.” Can you please provide an overview of what system integration will involve in the subsequent CRM effort?

**Commerce answer: Integration with our current internal systems, to include the Contract Management System (CMS) application and other internal network services (SharePoint, Active Directory, etc.).**

1. Section 1.3, phase 1, mentions the customer processes owned by the business units. Can you provide the number and name of these processes for each business unit?

**Commerce answer: Most of the processes revolve around grant/contract development, execution, management, monitoring, and close-out.**

1. Section 1.3 phase 2, requests the building of a gap analysis. What dimensions of readiness do you desire this gap analysis to cover?

**Commerce answer: At a minimum, this gap analysis should cover business process, technical integration, and data management requirements to meet the desired future state use cases. We expect that the awardee may identify other critical dimensions through the project kick-off process.**