

## **Request for Information – Instructions to Vendors**

### **Contact / Customer Relationship Management SaaS Solution**

#### **I. Preferred Vendor Experience**

- A. Completion of ten (10) projects within the last five (5) years, three (3) of which are SaaS projects similar to the project stated in this RFI. Briefly describe the three (3) SaaS projects including project start and end dates.
- B. The SaaS solution has been in production at a minimum of ten (10) organizations for a period of 24-months or longer. Name or generally describe by industry type the referenced organizations and associated project start and end dates.

#### **II. Solution Minimum Requirements**

The purpose of this RFI is to gather details from experienced vendors regarding available cloud-based software for contact / customer relationship management solutions capable of supporting GLWA's customer ("member partner" or "MP") engagement needs. GLWA minimum requirements for the SaaS solution include the ability to:

- A. Manage and track all MP contact and community data
- B. View, log and track select MP email communications
- C. Create, manage and track MP events, requests, tasks, issues, interactions and topics of interest
- D. Receive and set reminders for MP related tasks
- E. Attach documents to the contact records
- F. Generate MP contact data reports
- G. Integrate with Microsoft Outlook
- H. Support the one-time import of MP contact and community data from GLWA's Water Automated Meter Reading (WAMR) portal, Excel, and Smartsheet
- I. Allow MPs to log and track issues and requests using the solution
- J. Provide a cloud-hosted software-as-a-service (SaaS) subscription
- K. Support single sign-on (SAML/OIDC/OAuth 2.0) for secure and seamless access
- L. Access the solution via GLWA devices, tablets and mobile phones
- M. Provide compliance with SOC2, ISO, OSHA, DOL, etc. standards and applicable regulations
- N. Configure data retention policies
- O. Provide no-code/low-code configuration of fields, forms, workflows, and other applicable components

The solution does not require sales or marketing management applications or tools.

#### **III. Solution Capabilities**

Vendor's response must include the following:

- A. General
  - 1. Management of MP contact information.
  - 2. Organization and tracking of MP events, activities, issues, and communications.

3. Member partner ability to log and track queries and issues.
  4. Workflow, task, and notification capabilities that support cross team coordination.
  5. Reporting and dashboards for operational and leadership use.
  6. Mobile accessibility or other field friendly features.
  7. Emerging or innovative capabilities relevant to MP engagement.
- B. Configurability and User Experience
1. Ability to configure data forms, fields, views, and workflows without custom code.
  2. Role based access, user permissions, and security controls.
  3. Ease of use for business team members across multiple teams.
  4. Options for tailoring interfaces or functions to different user groups.
- C. Integration and Technical Requirements
1. Available APIs and integration methods.
  2. Overview of data structure, data management, and scalability.
  3. Hosting, uptime, performance, and service level expectations.
- D. Security, Compliance, and Data Governance
1. Data protection practices and controls.
  2. Authentication and authorization standards.
  3. Compliance with relevant regulations, industry standards, and cybersecurity frameworks.
  4. Records retention capabilities.
  5. Data audit and logging capabilities.
- E. Implementation and Support Model
1. Typical implementation timeline, project phases, and GLWA resource requirements.
  2. Configuration, training, and onboarding approach.
  3. Ongoing support, maintenance, and customer service structure.
  4. Update and release management process.

#### **IV. Solution Pricing**

Pricing information is for planning and comparative evaluation purposes only. Vendor's pricing will be considered non-binding, indicative, and subject to change during any subsequent request for proposals or contracting process. Submission of pricing in response to this RFI does not constitute a formal offer or quote.

- A. Costs. Provide high-level budgetary pricing for the proposed solution including:
1. A description of your standard pricing model (e.g., subscription, perpetual license, consumption-based, or other).
  2. Estimated costs for core components of the solution including:
    - i. Software licensing or subscription fees,
    - ii. Implementation, configuration, or deployment services,
    - iii. Training and user onboarding,
    - iv. Support and maintenance (annual or recurring),
    - v. Optional modules, add-ons, integrations, or enhancements.
  3. An explanation of key cost drivers or variables influencing pricing.

- B. Assumptions. Provide pricing based on the following assumptions:
  - 1. Number of users: 35 users, including 5 administrators
  - 2. Expected usage levels: Approximately 200 MPs
  - 3. Implementation timeframe: 6–9 months
  - 4. Any other relevant parameters that impact pricing should be clearly identified.
- C. Format. Submit pricing in a clear and structured format. Vendor’s standard pricing template may be used, but pricing must include:
  - 1. Line-item detail for each component,
  - 2. One-time versus recurring costs,
  - 3. Assumed term length (e.g., annual, multi-year), and
  - 4. Any volume discounts, bundling options, or tiered pricing considerations.
- D. Alternatives (*Optional*). Include any explanatory notes, pricing alternatives, or recommended cost-saving approaches. If multiple pricing models are available, please provide each with a brief description.

## V. Submission Instructions – Organization of Response

Vendor’s written response shall be no more than twenty (20) pages, typed in 11-point font or larger. Responses must be organized using the format described below.

**Part 1 – Company Overview and Experience.** Provide a summary of your company, background, history, years in business, core business, and approach to customer contact management. Include project experience and references requested above in Section I A and B, “Preferred Vendor Experience”.

**Part 2 – Case Studies (*optional*).** Provide examples of similar public sector, utility, or membership-based use cases and implementations of your solution.

**Part 3 – Solution Overview.** Provide an overview of your SaaS solution including information that identifies:

- A. How the solution meets the minimum requirements set forth above in Section II, “Solution Minimum Requirements”.
- B. How the solution meets the capabilities stated above in Section III A, “Solution Capabilities - General”.
- C. How the solution meets the capabilities stated above in Section III B, “Solution Capabilities - Configurability and User Experience”.
- D. How the solution meets the capabilities stated above in Section III C, “Solution Capabilities - Integration and Technical Requirements”.
- E. How the solution meets the capabilities stated above in Section III D, “Solution Capabilities - Security, Compliance, and Data Governance”. High level documentation is sufficient—detailed internal security documentation is not required.
- F. How the solution meets the capabilities stated above in Section III E, “Solution Capabilities - Solution Implementation and Support Model”.
- G. Any unique, emerging, or innovative features of your solution.
- H. Any additional features of your solution that may be of interest to GLWA.

**Part 4 – Solution Pricing.** Provide pricing as requested above in Section IV, “Solution Pricing”.

**VI. Solution Demonstration**

Vendor may be asked to participate in a demonstration to introduce its company and highlight key features of its solution relevant to GLWA's needs including contact management, communication tracking, event/activity management, issue/request tracking, reporting, and overall usability.

If requested, the demonstration will be conducted virtually via Microsoft Teams and be 90 to 120 minutes in duration. The demonstration should generally follow the outline below:

- 5 minutes: Introductions & agenda
- 5 minutes: Company overview
- 45 minutes: Scripted demo focused on required capabilities
- 15 minutes: Non-scripted demo of additional relevant functionality & features
- 30 minutes: Q&A
- 5 minutes: Wrap up, next steps

*(End RFI - Instructions to Vendors)*