



Winston-Salem

Request for Proposals

CityLink CSR Application Software

PROPOSALS WILL BE RECEIVED UNTIL

12:00 Noon, Friday, November 3, 2017

in

**Purchasing Department, City Hall Building
101 North Main Street, Suite 324 Winston-Salem, NC 27101**

ADVERTISEMENT FOR PROPOSALS

Sealed proposals endorsed **CityLink CSR Application Software** for the City of Winston-Salem will be received by the City/County Purchasing Department in Suite 324, City Hall Building, 101 North Main Street, Winston-Salem, NC, **until 12:00 Noon, Friday, November 3, 2017**. Instructions for submitting proposals and/or receiving the complete RFP document specifications may be obtained during regular office hours at the same location, or by contacting Jerry Bates via email jerryjb@cityofws.org (Email is preferred) or phone 336-747-6939. The City reserves the right to reject any or all proposals.

Jerry Bates
Purchasing Director

This document IS NOT the complete proposal. To obtain the completed proposal specifications contact Jerry Bates via email jerryjb@cityofws.org, by phone 336-747-6939, or visit the Purchasing Department, City Hall Building, Suite 324, 101 North Main Street, Winston-Salem, NC during regular office hours.

I. Background

The Winston-Salem Information Systems Department is requesting proposals for software and services to replace the City’s customer relations management (CRM) application.

The city operates a centralized call center (CityLink) that provides citizens the ability to contact any city department using a single point of contact approach. In addition to taking phone calls and opening service tickets the CityLink call center representatives can be contacted using a web based application, web based chat services and via a mobile application. The city is looking to achieve a “closed loop” solution that will provide the call center representative the ability to contact the citizen with an ongoing status of the service ticket from opening to closure of the call ticket.

The objective of this RFP is to identify and recommend an on premise, hosted, or cloud based CRM solution that allows the city’s centralized call center (CityLink) to open service tickets, make assignments, pass all necessary information on to department representatives, and track each service request through completion. Once any necessary work is completed, a historical log needs to be archived for performance and reporting purposes and the citizen can be contacted and informed of the final outcome.

The proposed solution must integrate with:

- Azteca Systems CityWorks version 15
- Perconti CDPlus version 5.2.0.26
- ESRI Geographic Information System for mapping and spatial functionality ArcGIS version 10.5
- Microsoft Active Directory (ADFS or LDAP) for City employee logins

This RFP outlines the relevant business processes currently used by the CityLink call center. The preferred proposal will provide software and services for the CRM solution implementation, integration and training.

RFP General Information

Release Date	October 5, 2017
Due Date	12:00 Noon, Friday, November 3, 2017
Transmittal of Response	Jerry Bates Purchasing Director City/County Purchasing Department 101 North Main STE 300 Winston-Salem, NC 27101 (336) 727-8000 jerryjb@cityofws.org
Electronic File Format	Microsoft Word and/or Adobe PDF
Questions/Inquiries	Proposer Questions and Inquiries relative to this RFP must be submitted <u>in writing only by 12:00 Noon, Thursday, October 19, 2017</u> , to Jerry Bates, City/County Purchasing Director, 101 North Main Street, Winston-Salem, NC 27101 or e-mail: jerryjb@cityofws.org (Email is preferred), Fax: (336) 727-2443. Questions will be answered within one (1) week of receipt or by 10/26/2017 and circulated to all whose interest is known as of that date.
Responsibility for Ensuring Receipt	Responders are responsible for ensuring receipt of questions and of information.

Evaluation Criteria	Responses to this RFP will be evaluated based upon the following criteria: <ul style="list-style-type: none"> • Functionality • Cost • Vendor Experience
Planned Schedule (subject to changes):	Request for Proposal Response Due: 12:00 Noon, Friday, November 3, 2017 Evaluation of Responses: November 2017 Product Demonstrations: December 2017 Product Selection Process: January 2018 Project Implementation Starts: February 2018

Solution Objectives

- Document, manage and track citizen requests and complaints through final ticket resolution.
- Open requests for work or services by CityLink customer service agents and create assignments for all city departments.
- Allow CityLink, field workers and citizen customers to monitor the status of requests and assignments opened.
- Open service requests via web interface, manual input or via a mobile app.
- Run adhoc and canned reporting capabilities for all departmental users
- Provide historical reporting information.
- Provide graphical dashboard information and reporting features
- Allow the ability to attach photos or other documents to service request tickets.
- Provide functionality to monitor the status or review tasks and track their completion against scheduled due dates and other service level objectives.
- Provide mobile access (smartphone or tablet) to city work staff to update SR tickets, create SR tickets, add comments or reassign work on SR tickets.

Solution Requirements

Any acceptable solution must include these basic requirements:

1. Provide a browser based application that is accessible by everyone using the application
2. Contains Single Sign-on capability via Active Directory via LDAPS
3. Ability to interface with the city’s MS Office 365 email system
4. Ability to interface with selected city applications or databases including:
 - CityWorks version 15
 - ESRI ArcGIS version 10.5 or higher
 - Calabrio (UCCX) version 11.5
 - Cisco Social Miner Chat Services
 - Perconti CDPlus version 5.2.0.26
5. Ability to generate canned management reports
6. Ability to generate email notifications when service tickets are created.
7. Ability to create and generate adhoc reports
8. Ability for citizens to create tickets through a web accessible screen
9. Provide the capability to create tickets through an online mobile app like ‘CityLink311’ using Open311 protocol
10. Ability to prepopulate selected data fields from incoming telephone calls such as caller name and phone number
11. Ability to append text files, PDF’s, pictures, or other attachments to tickets

12. Ability to manually configure selected fields like call type and priority
13. Ability to generate text alerts or email messages to employee field workers and/or citizens
14. Accessible through social medial platforms
15. Contains a knowledgebase
16. Intuitive address searching capabilities with ‘auto suggest’ features

Optional but preferred features:

- Application access through a mobile application for city users
- GPS capabilities that include the ability to locate and identify assets such as hydrants, signs, lights, etc...
- Individual notes or comments section for each service request assignment
- Ability to track call stats such as length of call, hold time, etc.
- Multi-lingual functionality
- ADA compliant user features

II. Business Process

The following section describes the business processes at a high-level and is not intended to replace the need for a detailed business process analysis.

The CityLink call center support staff is the first level of service provided by the city to interface and help resolve citizen problems and issues. The purpose of CityLink is to provide a single point of contact for the citizens of Winston-Salem. Whenever a citizen contacts CityLink to report a problem, ask a question, lodge a complaint, or seek assistance in resolving an issue, CityLink Customer Service agents should have the necessary information readily available to them to provide immediate assistance to the citizen. In situations that cannot be addressed immediately, the agents must be able to obtain all of the relevant information from the caller and pass that information on to the correct city department that can effectively address the caller’s needs. Identifying the correct call type and business department is achieved through a process scripted, response driven questions and workflows within the CSR system. These questions are prepared in advance so that all agents use the same questions and processes in identifying and routing service tickets. See a complete list of call types in Appendix D. Currently this is done in the city’s CSR system, Motorola PremierOne CSR. The city has been using the Motorola PremierOne system for more than 10 years.

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Associated Applications

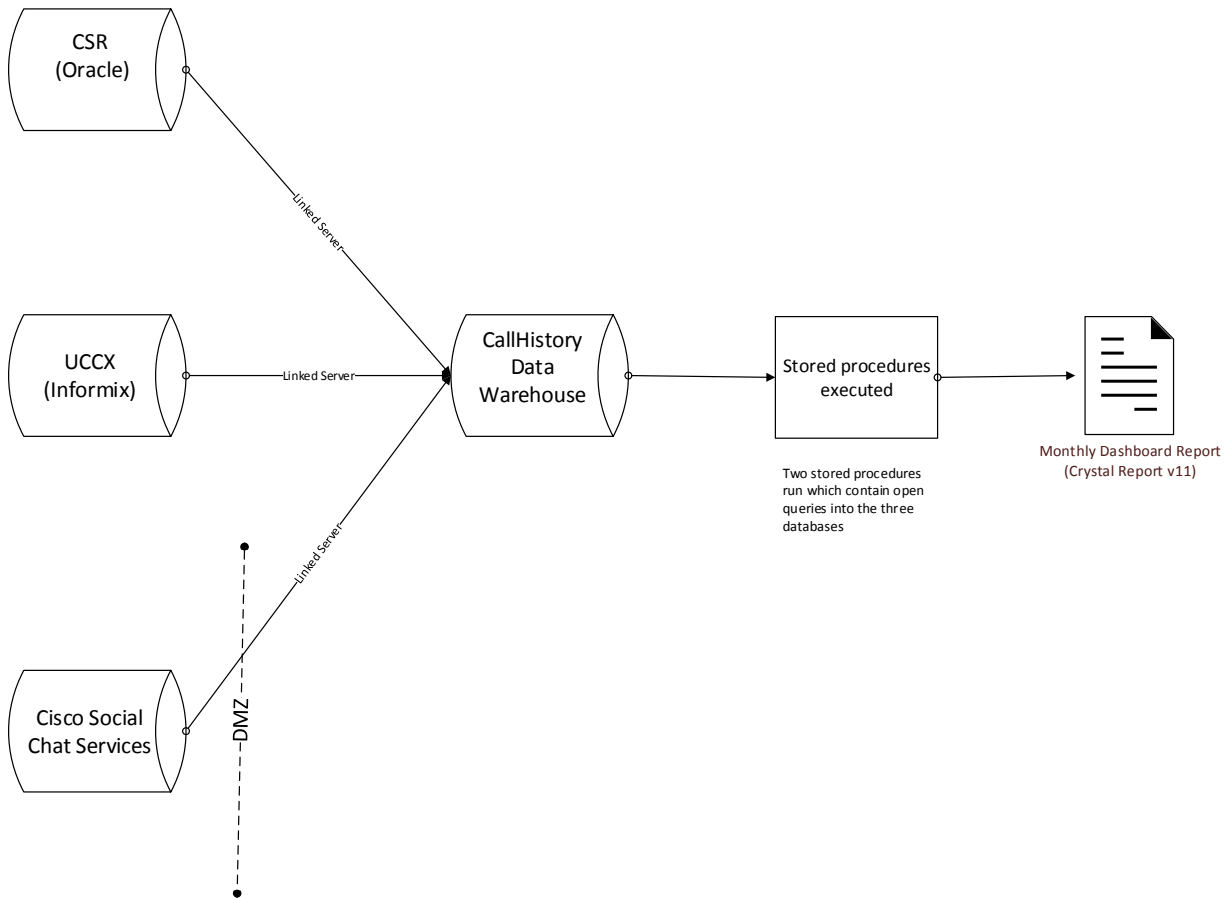
Additional means of communication with the CityLink call center include an online chat feature which provides citizens a web chat interface to the CityLink agents (Cisco Social Miner Chat Services) and a web portal interface to the CSR application that provides the capability of allowing citizens to open a ticket directly.

There is also the CityLink 311 app created by ‘See – Click – Fix’. This app provides citizens a smartphone application that creates Service Request orders directly through a mobile based application for both iOS and Android based operating systems. Any replacement solution must be compatible with the CityLink311 system or have a replacement alternative.

Reporting

Reporting capabilities exist for the system in two primary types. Canned reports provide much of the data used by CityLink for statistical information. Additionally, there are a large number of in-house reports used by CityLink that contain data from non-CSR systems. These reports are written in Crystal Reports and access other databases to retrieve data elements in addition to the data from the CSR system. An example of this type of report is the CityLink Dashboard Report, which accesses the CSR system, the online chat database, and the UCCX databases. These reports will need to continue to access any CSR replacement database to obtain the necessary information required to build these types of reports.

CityLink Dashboard Report Data Flow



July 6, 2017 by: WAI

Data Migration

The city may elect to migrate the existing data in the current Motorola system as part of the replacement solution to make it accessible for historical and reporting purposes. A recommendation on migrating the old CSR information, managing open tickets at the time of cut-over, and the gathering and presenting of all historical information should be included as part of the RFP response.

CityLink Volume and Usage

The call center is presently manned with an average of 22-23 active agents per month and handles approximately 25,000 – 35,000 inbound telephone calls per month. In addition, approximately 300 – 450 work requests are received from citizens using the application on the city web page. The city also uses a phone application that provides citizens mobile access. This method generates approximately

150-200 requests per month. The city's web site chat feature is responsible for the creation of approximately 50 – 150 additional monthly Service Requests. Through these communication modes, the Call Center creates approximately 30,000 to 38,000 Service Requests each month. Working hours are 7:00AM to 7:00PM Monday through Friday and 9:00AM to 5:30PM on weekends. Off hours are handled by Call Experts, a contract firm from Charleston, South Carolina.

III. Interfaces

The current Motorola PremierOne CRM system provides an automated interface to the two systems noted below. The interface generates information regarding the call ticket content and creates service requests in CityWorks and CDPlus. This capability must be made available in a new system.

- CityWorks version 15

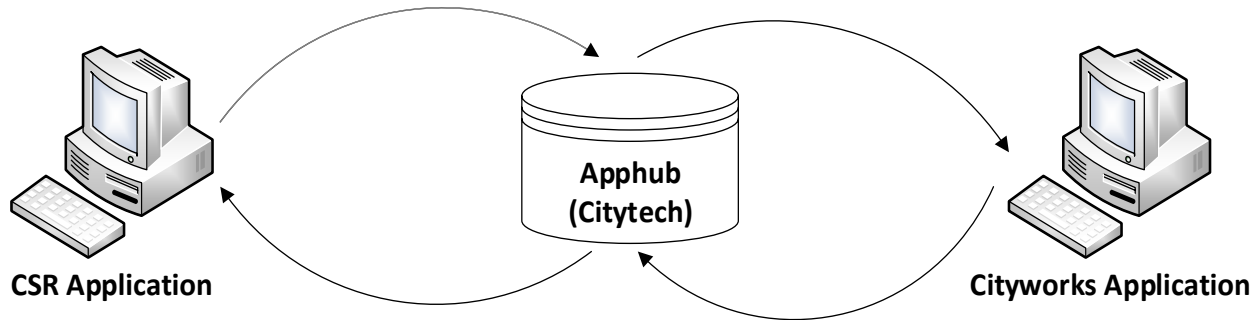
There is a 2-way interface to CityWorks. When a CSR ticket is opened a message is sent to CityWorks to create a new service request ticket. Data is transferred from CSR to CityWorks:

- SR code (service request type code)
- SR number
- Owner group code (department)
- Priority
- Method code (phone, web, etc.)
- Created date
- X coordinate
- Y coordinate
- Caller first name
- Caller last name
- Caller email
- Caller phone
- Caller address
- Caller city
- Caller state
- Caller zip
- Details
- Comments

When the SR is closed in CityWorks a message is sent to CSR to close the ticket. Data elements include:

- Comments
 - Closed status indicator
- The solution should also be capable of receiving interim status update messages from CityWorks as well as the current messages to create and close a Service Request.

CSR to Cityworks Data Flow Diagram



- A job in Apphub runs every five minutes to process new CSR service requests that are interfacing with Cityworks
- A procedure writes the CSR data to a Citytech table
- A procedure creates the Cityworks service request and the CSR data is inserted (XML API)
- A procedure creates an "Activity" in the CSR service request containing the Cityworks service request number
- The closing of the Cityworks service request and all related work orders triggers the procedures to grab the Cityworks service request comments, associated work order numbers, and work order comments.
- A procedure creates an "Activity" in CSR that contains all of the Cityworks service request comments and associated work order numbers and comments.
- A procedure closes the CSR service request.

July 6, 2017 by: WAI

- Perconti CDPlus version 5.2.0.26

There are 2 individual interfaces to CDPlus. When a CSR ticket is opened a message is sent to CDPlus to create a case request ticket. Data transferred from CSR to Action Order includes:

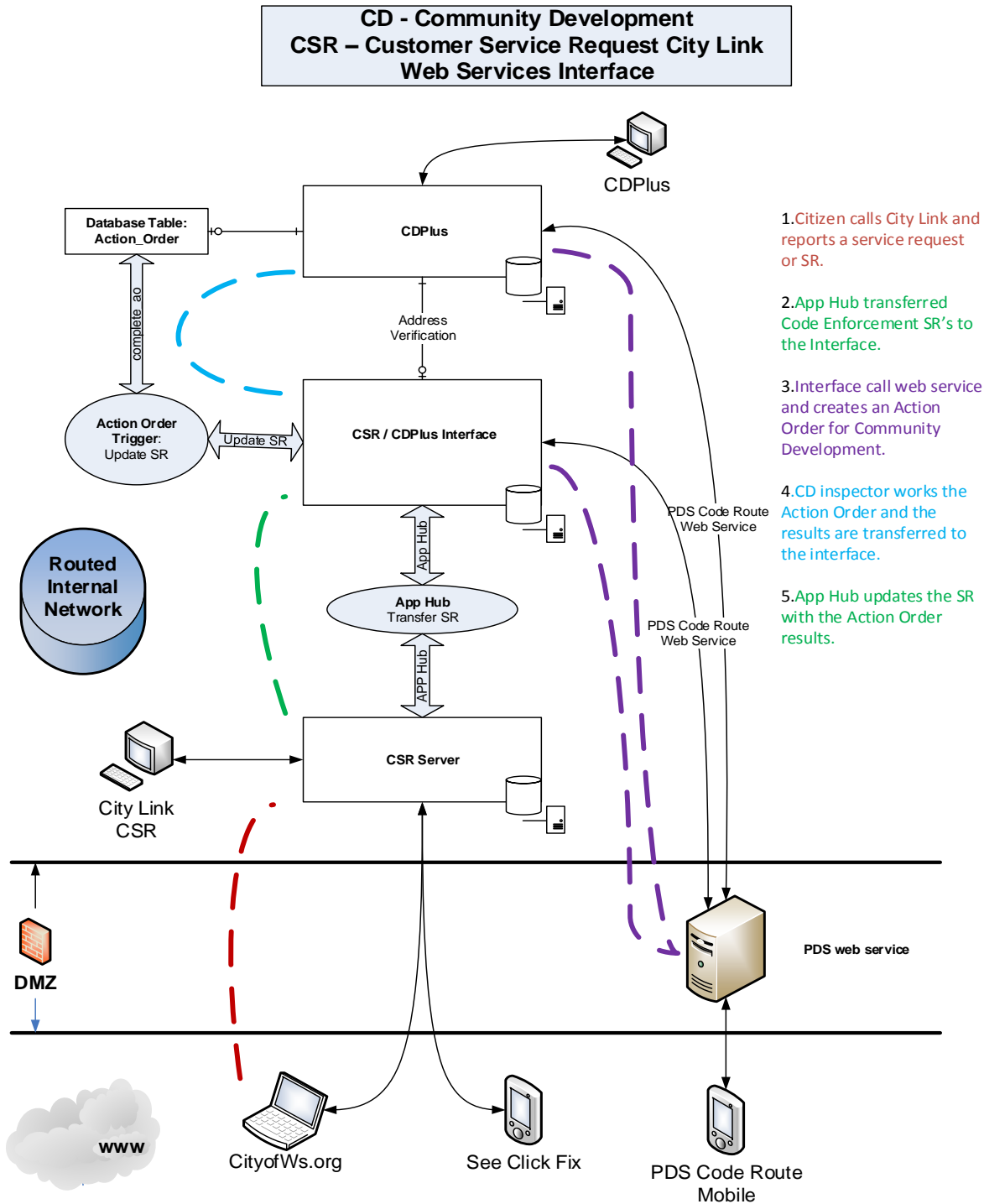
- SR Type Issue - Violation
- SR Address of Issue
- Complainant Name
- Complainant Address
- Complainant Phone Number
- Complainant E-Mail

When the CDPlus case ticket is closed a message is sent back to the CSR system to close the case ticket in the Motorola CSR system. Data transferred from CDPlus to CSR includes:

- SR Activity, Action order created and action order number
- SR Activity, Action order status changed
- SR Activity, Code case created and code case number
- Close SR

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CityLink / Perconti CDPlus Data Flow



IV. Proposal Format

Please keep responses as simple and economical as possible, providing a straightforward and concise description of the proposed solution to meet or exceed the City's business requirements. Costs incurred preparing and submitting a response are the responsibility of the responder.

Responses to each section and all questions below should be provided in the **Proposal Response** section provided at the end of this document.

Executive Summary

Provide a general overview of the RFP response with a component summary including summary level costs for the software and services for which you are proposing.

Proposed Solution

1. Provide a description of the proposed solution with a focus on superior features or documented benefits that distinguish the solution.
2. List in detail all software licenses and services for the solution(s) for which you are proposing and the fixed cost price for each. Please use the following example format to present the costs for the proposed solution over the following 5 yr. period.

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3. Provide a summary or description of any costs noted above as “additional one-time” or “additional ongoing”.
4. Provide a summary project schedule or timeline with a proposed implementation beginning in February 2018.
5. List all maintenance and support service levels and costs for each.
6. List any of the major supported browsers that is not compatible with your solution.
7. Provide a list of references we may contact that have implemented a similar solution. The reference list must include the following:
 - Name of client, address, telephone number, and point of contact
 - Date work was performed
 - Brief description of work performed
8. Statement that the proposed solution is compatible with CityWorks version 15 and with Perconti CDPlus version 5.2.0.26.
9. Describe your solution platform including footprint, servers required and databases. If your solution is cloud based or subscription based, please describe the architecture platform, security, redundancy, data bases, back-up methods in use, uptime statistics and the disaster recovery methods that are in place.
10. Describe how your solution interacts with social media platforms both incoming and out-going.
11. Statement indicating that the product solution is compatible with the City’s “Cisco Social Chat Services” application. Also please indicate if a replacement chat feature will be available in the solution.

12. Provide a statement of certification that any on premise solution proposed will effectively perform on a VMWare infrastructure with Cisco UCS servers.
13. Describe the overall solution architecture including the number of on premise servers (if any) and software licensing requirements for which the City would be responsible. Also include any open standards technology or languages the solution uses (i.e., .NET, Java, etc.).
14. List any third party application software or services that will be needed for the proposed solution to operate and define their function. Please include all applicable version numbers.
15. Complete the requirements matrix listed in Appendix B.
16. Provide an example Scope of Work (SOW) for a similar implementation.
17. Describe the training process you will use to assure adequate training is provided to city employees that will operate the system including users, service desk personnel, IS application support, configuration administrators and management use. Also describe the type of training materials and training aids that will be provided for current and future needs.
18. Describe how you will set up, organize, and implement a knowledge base that will provide useful content to both city employees such as the call center agents, and a web based customer facing view for citizen use.

INSTRUCTIONS TO PROPOSERS

INTRODUCTION:

This entire set of documents constitutes the RFP. The proposer must return the RFP with all information necessary to properly analyze the proposer's response as stated within the RFP document. **All proposals shall be returned in a sealed container/envelope marked "CityLink CSR Application Software"** and submitted to the City/County Purchasing Department in Suite 324, City Hall Building, 101 North Main Street, Winston-Salem, NC, no later than **12:00 Noon, Friday, November 3, 2017**. **Late proposals will not be considered.**

Proposer Questions and Inquiries

Proposer Questions and Inquiries relative to this RFP must be submitted **in writing only** by **12:00 Noon, Thursday, October 19, 2017**, to Jerry Bates, City/County Purchasing Director, 101 North Main Street, Winston-Salem, NC 27101 or e-mail: jerryjb@cityofws.org (**Email is preferred**), Fax: (336) 727-2443. The City will provide written responses to all inquiries received by this date, and responses will be made available to all recipients of this RFP. Any oral responses made by any representative of the City may not be relied upon. Any supplements or amendments to this RFP will be in writing and furnished to potential bidders.

RFP Response Submission

Proposals must be submitted in a **sealed container/envelope** containing **one original (please mark document as original)** proposal showing original signatures and seals, **and two (2) copies** of the complete proposal. Submittals **will not be accepted by fax or electronic mail.**

The City will not be obligated for the expenses of any provider arising out of preparation and/or submittal of responses to this RFP. Any and all proposals to this RFP are to be prepared at the cost and expense of the respondents, with the express understanding that there may be no claims whatsoever for the reimbursement of any costs, damages, or expenses relating to this procurement from the City or any other party for any reason (including the cancellation of this RFP).

Proposals must be made in the official name of the individual, firm, or corporation under which the business is conducted (showing official business address) and must be signed in ink by a person duly authorized to legally bind the business entity submitting the proposal.

All proposals should be complete and carefully worded and must convey all of the information requested by the City. If errors or exceptions are found in the proposal, or if the proposal fails to conform to the requirements of the RFP, the City will be the sole judge as to whether that variance is significant enough to reject the proposal.

Proposals should be prepared simply and economically. All data, materials, and documentation shall be available in a clear, concise form. The City reserves the right to reproduce proposals for internal use in the evaluation process.

Proposers are expressly forbidden from contacting any other city employee or city of Winston-Salem elected official regarding this Request for Proposals. Any such outside contact may result in disqualification from the request for proposal process.