



Request for Quotes: 2017-010 CRM Customization

Indianapolis Private Industry Council, Inc., d/b/a EmployIndy is seeking quotes from qualified individuals or companies who have experience in Salesforce CRM customization and implementation.

Background

EmployIndy guides the local workforce ecosystem and makes strategic investments to remove barriers to quality employment for underserved and underrepresented residents. As the workforce development board for Marion County, guided by 21 business, civic, education and non-profit community leaders, EmployIndy invests \$17 million in public, private and philanthropic funds for both youth and adults annually.

CRM Customization: Project Scope and Specifications

EmployIndy has recently started using Salesforce CRM for managing relationships and tracking engagement with our employer partners, community partners and vendors. We are seeking services for the following items associated with implementation:

- Consultation on usage based on evolving needs.
- Customization of platform and data indicators.
- Creation of dashboards and reporting.
- Integration with email systems.
- Technical support and training on usage.

Project & Proposal Requirements

1. EmployIndy is seeking proposals from applicants who are capable of addressing the above stated required functionalities.
2. Proposals must include a clear description of the applicant's plan to complete all the components (i.e. in what order will the projects be completed, how long each component will take to complete, etc.).
3. Bidding agencies may be asked to provide a demonstration of their system.
4. It is expected that the point of contact of the selected vendor will provide the agency with ongoing guidance and technical support.

Application Process & Procedures

Please provide a complete written response to this RFQ which is double-spaced and does not exceed 15 single-sided pages.

The following information should be included in the quote:

1. Company Overview:
 - a. Provide a brief organizational history, including year organized.

- b. Experience working with federal/state funded nonprofit entities.
 - c. Examples of other projects and organizations for which you have provided these services.
 - d. Additional on-going services provided after execution of contract.
 - e. Any other unique qualifications.
2. Personnel:
- a. Describe the organization's top executive and management structure.
 - b. Describe how your projects are prioritized to meet deadlines and deliverables. Do you have dedicated staff? Are there representatives located in Indiana?
 - c. Provide an organizational chart and resumes describing the experience of key staff.
3. Fee Schedule:
- a. Demonstrate fees based on providing these services.
 - b. Include a timeline and any additional fees.

Applicants must submit one (1) electronic copy of the proposal. Please note that EmployIndy will not return any proposals it receives and will not reimburse applicants for any costs they incur in developing their proposals.

All quotes should be submitted no later than 4:00 p.m. EST, Friday, January 5, 2018 to Sara Phillips at sphillips@employindy.org.

Any questions should be submitted by 5:00 p.m. EST Tuesday, January 2, 2018 to Sara Phillips at sphillips@employindy.org. Answers to submitted questions will be made available on the EmployIndy website by close of business January 3, 2018.