



**Request for Proposal
RFP-201810.01**

**CONSULTING SERVICES: CRM DYNAMICS
TECHNICAL SERVICE SUPPORT**

Deadline for Expressions of Interest: October 26, 2018 at 12 noon EST

Deadline for Proposals: November 7, 2018 at 4:00pm EST

This RFP may also be found on the Invest Ottawa website: www.investottawa.ca

Background: About Invest Ottawa and the Ecosystem We Serve

With a vision to enable Canada's Capital to achieve its full potential as a globally recognized, innovative and future-ready region – the best place to learn, work, live and play – the team at Invest Ottawa works tirelessly as Ottawa's lead economic development agency, creating high value jobs which grow our economy through two key business units:

- **Venture Development:** Through incubation and acceleration services, this team helps entrepreneurs launch, grow, and scale.
- **Global Expansion:** Engage global markets to attract foreign direct investment, retain and expand their local operations as an integral part of strategic markets and ecosystems; while simultaneously facilitating trade and business retention and expansion.

Strategic Context

Invest Ottawa recognizes that the community is an ecosystem of innovation-supportive programs and initiatives, and is constantly working to identify and enhance the capacity of these initiatives that support the innovation agenda. Invest Ottawa continues to work closely with the support of the region's innovation partners including the universities and colleges, local business incubators, government agencies, research institutions and industry clusters.

Invest Ottawa (<https://www.investottawa.ca/>) is located at Bayview Yards, Ottawa's innovation hub and one-stop business acceleration shop. The ultimate mash up of technical, business and market expertise and resources, Bayview Yards (<http://www.bayviewyards.org/#welcome-to-ICBY>) equips our most promising entrepreneurs and technology firms with the technical, business and market capabilities they require to take on the world! Assembling a host of innovation-based programs and organizations including Invest Ottawa, Bayview Yards serves as a springboard for these ventures from start-up to scale-up, helping them to reduce risk, accelerate growth, and spur commercial success and economic development in our community.

Scope of Work

With a long-term vision to incorporate Microsoft Dynamics CRM as the key internal operating system, Invest Ottawa transitioned to Dynamics CRM in September 2017. The team, along with our external migration support, have spent this past year optimizing its use to match our internal processes. With this model in place, Invest Ottawa now requires technical support as we prioritize and plan further system capabilities enabling us to fully achieve our vision.

We are seeking a consultant or firm with a proven track record in Microsoft Dynamics CRM help us achieve these objectives. The result will be a Service Agreement to provide on-going maintenance support, as well as a solutions delivery approach when complex solutions need to be designed, developed and deployed.

Invest Ottawa will continue to lead CRM enhancements using an agile project management framework and philosophy. What we need from you is in depth development knowledge and technical solutions architecture experience to support implementation of these projects. Upgrades

include general UX improvements, third party add-ons and API integrations, data manipulation and customization work. You would be expected to participate in the sprint planning process, prioritizing work efforts and designing the sequence of events by providing accurate time and effort estimates. With your knowledge of standards and best practices you will be able to recommend and lead demonstration sessions on appropriate solutions that will improve internal process flows resulting in more efficient how our business units utilize CRM to drive their work.

System Specifications

We have over 40 active users, spread over eight teams, with one separate security profile established for consultants. With almost 50,000 contacts, Dynamics is currently being utilized to track client progress through various program stages offered, lead generation through to the sales funnel for the attraction of foreign-direct investment companies, and relationship management for our partnerships and sponsors. Six out of eight teams are fully integrated users, with Marketing team capabilities the next priority. The Executive Leadership Team will be added in Q1 2019, however most of their use will be focused through the power BI integration.

Invest Ottawa is functioning on a cloud-based version 8.2 of Microsoft Dynamics 365. We maintain two active environments:

- PROD: live environment used by all Dynamics users.
- STAGING/DEV: development/test environment used for development and user testing. Used only by system administrators/customizers and development team.

Current integrations include:

Microsoft Dynamics 365 App for Outlook

- OOB integration
- Used for tracking e-mails and meeting from Outlook to Dynamics 365
- Status: Implemented and Functional

Dynamics 365 for Phones

- OOB integration
- Rarely used, only by few users to consult information about clients
- Status: Implemented, requires few adjustments

WordPress:

- Gravity Forms from WordPress integrated with Dynamics using an [add-on](#)
- Used to automatically create lead records in Dynamics directly from our Website (Lead Intake form)
- Status: Implemented and Functional

PowerBI:

- Dynamics dataset linked to PowerBI using Dynamics API
- Used for reporting
- Status: Implemented and Functional

Future integrations to be deployed in early 2019:

Eventbrite:

- Eventbrite is currently used for Event management, we will be looking into integrating it with Dynamics 365

MailChimp

- MailChimp is currently used for Email marketing, we will be looking into integrating it with Dynamics 365

Dynamics 365 for Marketing

- Could potentially answer Eventbrite and Mailchimp requirements. Will be addressed after Dynamics 365 version9 update.

Outcomes & Evaluation

The proposal must describe the qualifications of the proponent to deliver on the objectives of a Service Agreement, and conduct the scope of work proposed. This includes relevant expertise, knowledge and previous experience of the proponent. When summarizing experience, proponents should describe previous complex technical solutions delivered.

The proposal will breakdown your cost structure, including an hourly rate(s) by skillset/activity and any minimum monthly fees that will be charged. Specify whether complex solutions will be billed by time or by work segment delivered.

The selected organization will have a corporate culture and values compatible with Invest Ottawa. Tell us about your collaboration style, and your expectations of Invest Ottawa as a partner and project lead. What risks have you identified, and propose a shared risk mitigation strategy. Proposals will be evaluated equally on aspects of technical skills, previous experience on similar service agreements, responsiveness to needs, budget, and references provided.

References should be drawn from the three example projects provided by the proponent. References should be senior individuals with accountability for the overall Agreement and its outcomes, and who can speak directly to their experience with the proponent, and associated performance. Each reference must include the name, title, address, telephone number and email address for each individual.

Key Dates

1. Expression of Interest

Confirm your Intent to Participate by email by 12pm on October 26 by email to Joanne Gardner (jgardner@investottawa.ca).

2. Questions

Clarification questions should be submitted between October 29-31 by email to Joanne Gardner. An FAQ responding to all questions asked will be sent to all parties who expressed their Intent to Participate. Please note: Invest Ottawa will not receive or respond to questions by phone or in-person.

3. RFP Submission

Service providers must ensure that the proposal is delivered in PDF format via email before the RFQ closing date: Wednesday, November 7, 2018 at 4:00 PM.

4. Meeting with Invest Ottawa

Selected vendors will be invited to a meeting to present their proposal with the Invest Ottawa Dynamics Team on November 14.

5. Notification of Results

Invest Ottawa will notify all participants of our intent to partner by November 26.

The intention of Invest Ottawa is to award a contract for service. This RFP does not obligate Invest Ottawa to accept any bid. Invest Ottawa maintains the right to reject any or all proposals. Proposals submitted to Invest Ottawa in response to this RFP will not be returned to the proponent.