



## Questions and Answers

### RFP-ELCD-CRM-23-24

As of 10.9.2023

1. What type of solution is the ELC of Duval seeking, SaaS based or on-premises?  
**SaaS**
2. What have you spent on similar projects in the past and what is your budget range for this project? **This is the first of its kind, so we don't have a target budget just yet.**
3. What are the challenges you are facing in the existing set-up? **There is no existing setup.**
4. What type of services and features are you looking into the new CRM solution? Is there any specific feature you are looking in new solution? **This is our first. We don't have those specifics yet.**
5. What all integrations will be required for new CRM solution? **Beyond exporting and reports, sharing data between teams, we're open to suggestions. Again, it's our first CRM tool.**
6. What will be the expected go-live date for this project? Is there any suggested timeline for this project? **TBD.**
7. What are the important factors for ELCD when choosing a vendor? **Capabilities, support, uptime, cost.**
8. Do you need a Sales module to track information like leads and opportunities?  
**Not at this time.**
9. Do you need a Service module to manage inquiries and requests (as cases or tickets in the system) that come from internal staff and/or external stakeholders?  
**Possibly, it would be nice to see the option.**



10. Do you need a marketing module for promoting and managing communications and events such webinars, training sessions, and membership drives? For sending newsletters and announcements? **Yes.**
11. Do you have any workflow that is a priority for automation with the new CRM system? **Not now, but probably several in the future.**
12. Do you have any particular CRM reports and dashboards what would be especially helpful to the Coalition? **No, but will be needing to develop them when the system is populated.**
13. For managing and maintaining the system over the long term, does the Coalition favor no-code tools that will provide it maximum self-sufficiency for updating and building screens, workflows, reports, etc., in the new system? **YES, THIS IS A REQUIREMENT.**
14. Do you need for the new CRM system to integrate with any systems in addition to your email / calendar / task platform (typically Microsoft or Google)? **Microsoft 365 Integration would be great.**
15. How much data from current systems or spreadsheets is to be collected and loaded into the new CRM system? **We don't have an accurate measurement.**
16. Do your users need for the CRM information to be available to staff via apps on their Android or iOS devices? **Yes, that would be helpful.**
17. Although the Coalition appears already to have parent and provider portals, do you want to deploy portal pages for outside stakeholders? **Not at this time.**
18. Do you have any specific technical and security requirements? **MFA of some sort is required.**
19. Are you seeking a cloud-based solution (instead of a self-hosted one)? **Cloud-based solution is required.**
20. Do you require integrations with any external tools (i.e. an LMS, payment processor, etc.)? If so, which tools? **Not at this time.**



21. What ERP does the organization use today? **MIP by SAGE.**
22. How many users will need access to the CRM? **Approximately 110.**
23. Are you looking to replace your current portal? **We do not currently have a CRM.**
24. Are you seeking a system that both tracks programs/services as well as fundraising efforts? **We do not need to track fundraising efforts.**
25. In most cases, nonprofits will work with an implementation partner (i.e. consultant/consulting firm) to "stand up" our platform. Typically, we introduce a Partner(s) to the nonprofit organizations, but sometimes, organizations arrive to us with existing or preferred relationships. Does the ELC of Duval have an existing or preferred partner? **We do not at this time.**