



Winston-Salem

Request for Proposals

CityLink CSR Application Software

PROPOSALS WILL BE RECEIVED UNTIL

12:00 Noon, Thursday, April 5, 2018

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, Thursday, April 5, 2018**. 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 a 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 or business systems, and to track each service request through completion. The City is open to a hosted, cloud based, or on premise solution. Once a resolution is provided for the call ticket, any necessary work is completed and the ticket is closed, an archive log needs to be created for historical 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 that are currently used by the CityLink call center. The preferred proposal will provide software and services for the CRM solution implementation, integration and training.

Bid Selection Process

This RFP establishes the desired requirements and specifications, and intends to provide the prospective service provider with sufficient information to understand the scope of this request. Bidders are expected to submit a formal proposal that will include service provider's qualifications, pricing, service descriptions, and performance commitments that meet the minimum requirements of this RFP.

All proposals received prior to the established due date/time will be evaluated and considered based on the completeness of the responses to the defined specifications. The City of Winston-Salem reserves the right to award this contract to the vendor deemed best suited to achieve the goals and desires outlined in this proposal.

Evaluation Criteria

Respondents will be evaluated for selection on the basis of the Proposer most qualified to meet the requirements of this RFP. Major criteria to be considered in evaluation may include, but shall not necessarily be limited to:

- A. **M/WBE Commitment** – Proposer's efforts to comply with all the terms and conditions of the City of Winston-Salem's Minority and Women Business Enterprise (M/WBE) Program

through award of subcontracts to minority and women-owned business enterprises and utilization of minority and women owned business enterprise suppliers to the fullest extent consistent with the efficient performance of this contract.

- B. **Local Business (Distance from City)** - Proposer’s business location/distance from the City of Winston-Salem.
- C. **Financial Price value** - Financial competitiveness related to one-time cost and any on-going and add-on costs.
- D. **Functionality** – Compliance with the RFP specifications, requirements and integration capability, Bidder’s strategy to provide on-site training to city staff.
- E. **Vendor Experience** - The background, education, and experience of the respondent in providing similar services elsewhere, including depth of RFP questionnaire responses, industry knowledge, technical experience, available resources, and years in business, Reference list of clients etc.

The following “Weighted Scale” will be used to evaluate each proposal

Evaluation Criteria	Weight %
MWBE Compliance	20.00
Did not comply with MWBE certification	
MWBE certificate submitted with proposal	
Will award required portion of project to named MWBE certified contractor	
Certified a good faith effort to comply but couldn't locate a qualified MWBE sub-contractor	
Distance from City of Winston-Salem	20.00
Inside Winston-Salem	
Inside NC	
Outside NC	
Financial Price Value	20.00
One-time Costs	
On-going costs and add-on costs	
Functionality	20.00
Requirements	
Integration capability	
Vendor Experience	20.00
Viability to meet proposed timeline	
Reference list of clients	
Firm's years of existence	
	100.00

Proposal Selection Review Panel includes the following:

- Contact Center Department Head
- Contact Center Director
- Contact Center Assistant Director
- Contact Center Senior Analyst
- Applications and Data Base Coordinator
- 2 Information System Supervisors
- Information Systems Project Manager
- Information Systems Senior Analyst
- Information Systems Support Analyst
- Business Inclusion Analyst

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RFP General Information

Release Date	March 6, 2018
Due Date	12:00 Noon, April 5, 2018
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 - See Instructions to Bidders (page 38)
Questions	Questions may be submitted on or before 12:00 Noon, 03/26/2018 . All questions must be in writing to the street address and/or the email address listed above. Questions will be answered by March 29, 2018, and circulated to all whose interest is known as of that time.
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 – 20% • Cost – 20% • Vendor Experience – 20% • MWBE Commitment – 20 % • Distance from City – 20%
Planned Schedule:	Request for Proposal Response Due: April 5, 2018 Evaluation of Responses: April 2018 Product Demonstrations: May 2018 Product Selection Process: June 2018 Project Implementation Starts: July 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 a web interface, manual input, text 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 to everyone using the application
2. Contain 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 tickets with selected data fields captured from incoming telephone calls such as the 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:

- Ability for city staff to access the application through a mobile device application
- GPS capabilities that include the ability to locate and identify selected assets such as hydrants, signs, lights, etc...
- Ability to input individual notes or comments for each service request assignment
- Ability to track call statistics 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 of 20 – 25 on duty agents 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 of 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 the problem and routing the service tickets. See the complete list of call types in Appendix D. Currently this is done in the city's CSR system, Motorola PremierOne CSR with all questions and call types set up by an ADMIN super user. The city has been

using the Motorola PremierOne system for 15 years. There are approximately 75-100 departmental users that will have access to the CSR system in addition to the CityLink agents, management and the super user admin.

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 is used for citizen chat. Based on these chats with the citizen, a ticket is then created by the CityLink agent. Additionally, there is a web portal interface to the CSR application that provides the ability for citizens to open a ticket directly. The web portal link is located on the City internet page.

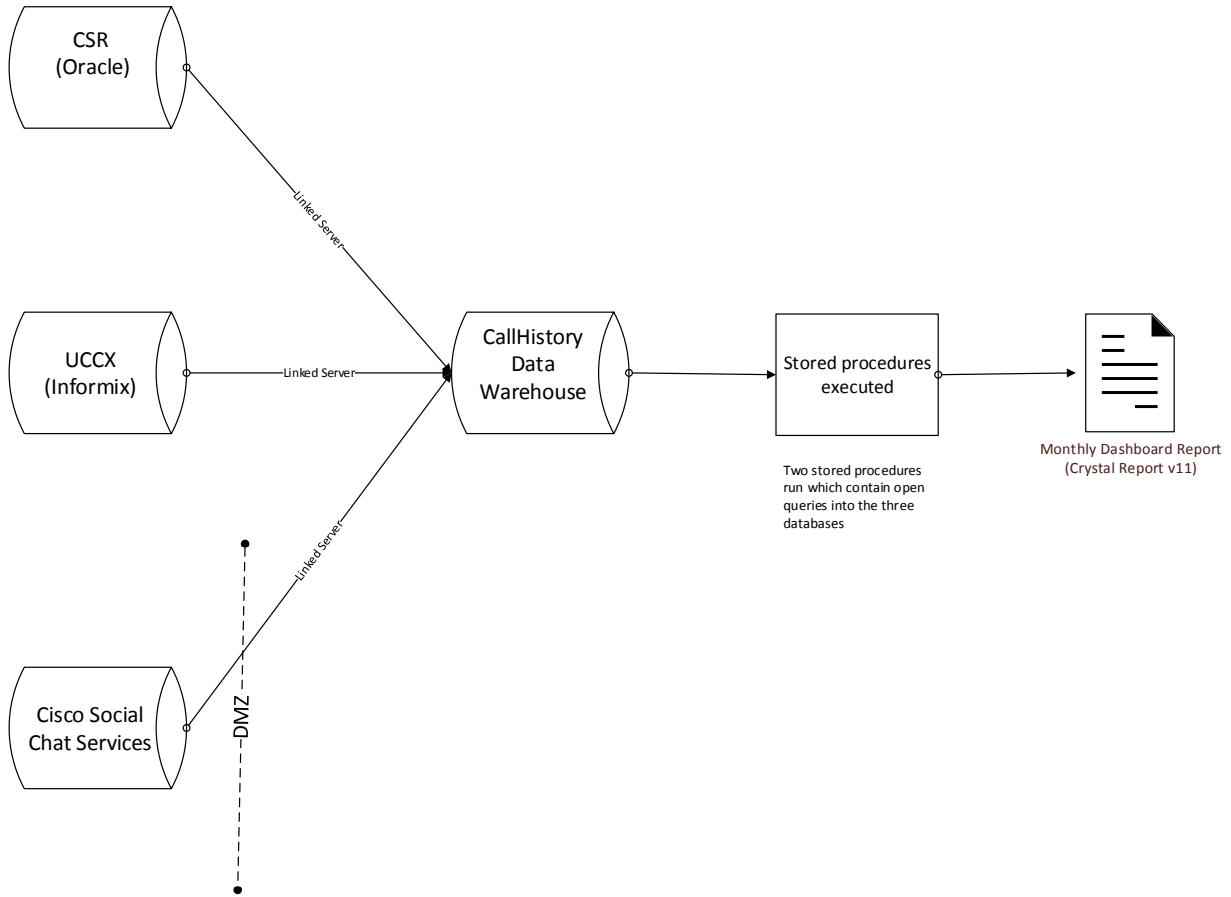
The City also has the CityLink311 app that was created by 'See-Click-Fix'. This app provides citizens a downloadable smartphone application that can create Service Request orders directly through a mobile based application for both iOS and Android based operating systems. This is the city's only Open311 protocol application. 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 may access other application 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. See Appendix E. These reports will need to continue to access databases from any CSR replacement system to obtain the necessary information required to build these types of reports. The City currently uses both Oracle and SQL databases and has sufficient support staff to maintain either database format. If your solution is hosted or cloud-based we will require full access to our data.

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CityLink Dashboard Report Data Flow



July 6, 2017 by: WAI

Data Migration

The city is not planning to migrate the historical data in the current Motorola system from closed CSR tickets as part of this project. We do plan on migrating all open CSR ticket into the replacement system. A solution on migrating CSR information contained in all open tickets at the time of cut-over, should be included as part of the RFP response.

Knowledgebase articles and content contained in the current Motorola CSR system will also need to be included as part of the data migration strategy.

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. This included approximately 20 contracted employees. The Call Experts support staff will also require the ability to access the system during designates “Off hours”.

III. Interfaces

The current Motorola PremierOne CRM system application hub (AppHub) provides an automated interface to the two systems noted below. The AppHub interface passes information regarding the CSR call ticket content and allows the necessary CityWorks and CDPlus information to create, update and close service tickets. This capability must continue to be made available in a new system. The AppHub interface will be replaced with API’s to interface with both CityWorks and CDPlus.

- 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:

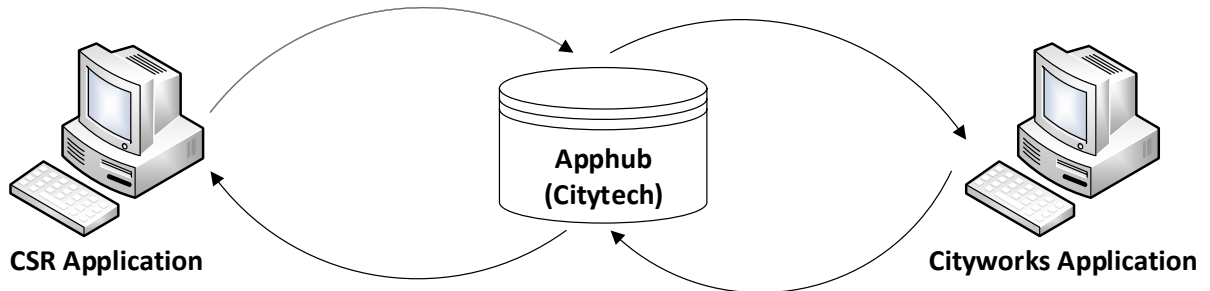
- SR code (service request type code)
- SR number
- Owner group code (department)
- Priority
- Method code (phone, web, etc.)
- Created date
- X coordinate
- Y coordinate
- Caller first name
- Caller last name
- Caller email
- Caller phone
- Caller address
- Caller city
- Caller state
- Caller zip
-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

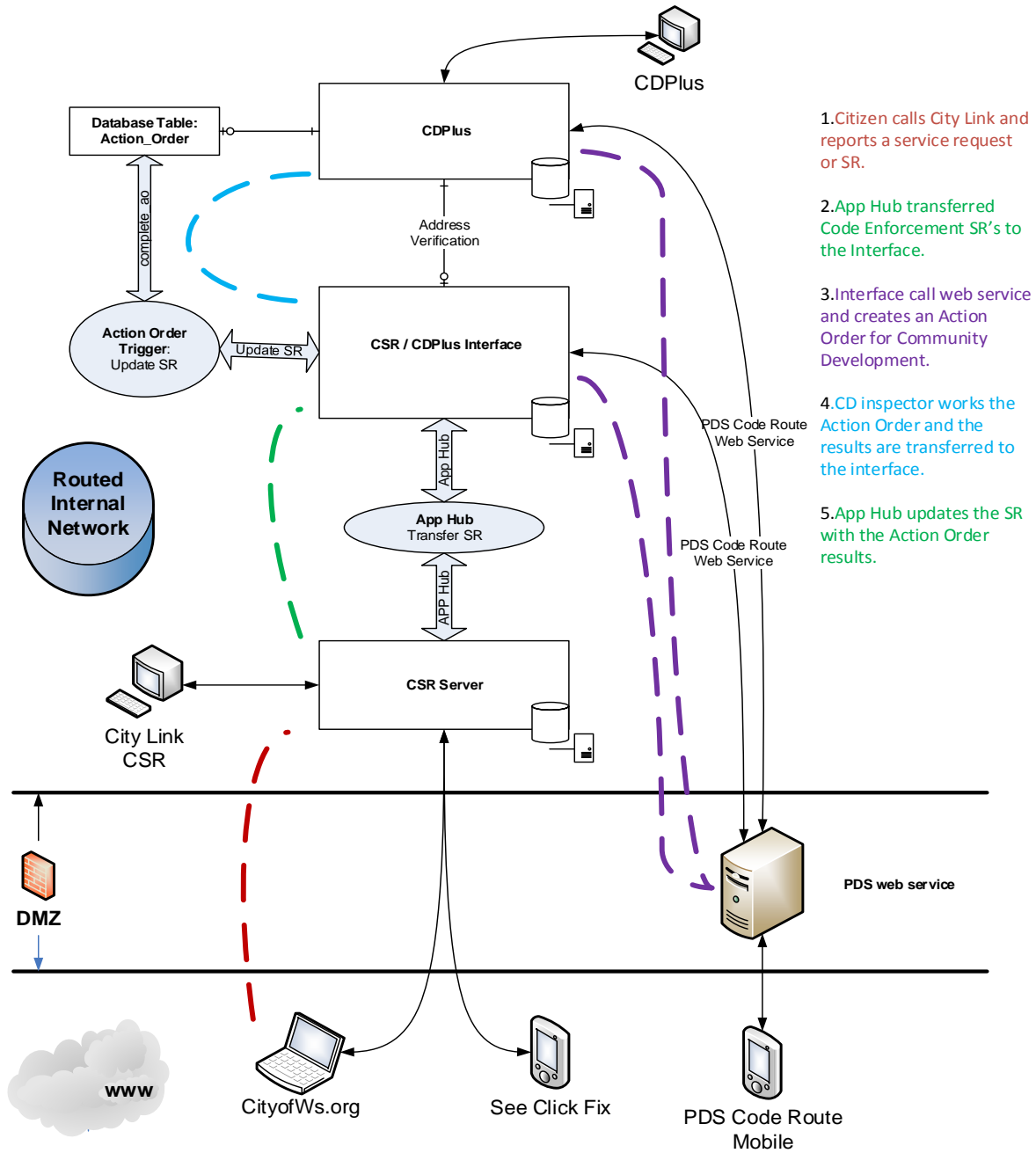
- SR Type Issue - Violation
- SR Address of Issue
- Complainant Name
- Complainant Address
- Complainant Phone Number
- Complainant E-Mail

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

CityLink / Perconti CDPlus Data Flow

**CD - Community Development
CSR – Customer Service Request City Link
Web Services Interface**



1. Citizen calls City Link and reports a service request or SR.
2. App Hub transferred Code Enforcement SR's to the Interface.
3. Interface call web service and creates an Action Order for Community Development.
4. CD inspector works the Action Order and the results are transferred to the interface.
5. App Hub updates the SR with the Action Order results.

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.

	FY 17/18	FY 18/19	FY 20/21	FY 21/22	FY 22/23	Total
One-time Project Costs						
Software	\$0	N/A	N/A	N/A	N/A	\$0
Services	\$0	N/A	N/A	N/A	N/A	\$0
Implementation	\$0	N/A	N/A	N/A	N/A	\$0
Data Migration	\$0	N/A	N/A	N/A	N/A	\$0
Training	<u>\$0</u>	N/A	N/A	N/A	N/A	<u>\$0</u>
Additional One-Time Costs	\$0	N/A	N/A	N/A	N/A	\$0
Total One-time Costs	\$0	N/A	N/A	N/A	N/A	\$0
Ongoing Costs						
Software Maintenance	N/A	\$0	\$0	\$0	\$0	\$0
Hosting/Cloud	N/A	\$0	\$0	\$0	\$0	\$0
Support Services	N/A	\$0	\$0	\$0	\$0	\$0
Additional Ongoing Costs	N/A	\$0	\$0	\$0	\$0	\$0
Total Recurring Costs	N/A	<u>\$0</u>	\$0	<u>\$0</u>	\$0	<u>\$0</u>
Total Costs	N/A	\$0	\$0	\$0	\$0	\$0

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 for a proposed implementation plan.
5. List all maintenance and support service levels and costs for each.
6. List any of the major supported browsers that are 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. Please provide a statement indicating 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. The City currently has a Facebook page and plans to utilize Social Media outlets in communicating with citizens. As Social Media applications become more acceptable, describe how your solution interacts with social media platforms both incoming and out-going.
 11. Please provide a 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. The City's current Motorola CSR system contains a knowledgebase. 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.

North Carolina Public Records Law

The City of Winston-Salem is required to adhere to North Carolina Public Records Law (NCPRL) guidelines. Please indicate whether you are willing to provide a data base schema for your solution?

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