

**The City of Santa Fe
AND
TOURISM Santa Fe (TSF)**

REQUEST FOR PROPOSALS (RFP)

**Santa Fe Community Convention Center CRM Software
System**



**RFP#
24/04/P**

Questions & Answers

Proposal Issue Date: 07/25/2023

**Santa Fe Community Convention Center CRM Software System
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Questions and Answers

	Questions	Answers	RFP Section	RFP PG #
1	Regarding B. Technical Specifications 1. Organizational Experience (a.): Will the City accept relevant corporate experience implementing a CRM for the federal government?	Yes	IV B	24
2	Regarding B. Technical Specifications 1. Organizational Experience (c.): Will the City accept project successes/failures from CRM software systems for other types of orgs or is it required to be a DMO?	We will accept project success and failures from other organizations.	IV B	24
3	What information is required in every BEO?	The Banquet Event Order (BEO) requires the following: Detailed list of all event set up needs per meeting room (tables, chairs, AV needs, staging, lighting, sound). Includes in and out times of the events. Food and Beverage needs and timing. Event layout/set up per room.	IV A	23-24
4	What exactly is meant in the scope of work when it says “manage media and partners?”	Media, ability to store and reference all media efforts (acolades, mailers, prospecting and print ads). Partners: ability to manage correspondence with our hotel partners pertaining to group RFP’s, proposals and emails.	IV A	24
5	What is meant by “manage meeting space on an hourly basis?”	We need to be able to see how our meeting space is being held/booked by our clients. We need to see what meeting space is being held and what times those spaces are booked.	IV A	24
6	For clarification, by inventory tracking, do you mean a tracked and up to date number of all materials listed (such as brochures, etc)?	Inventory tracking is based on our materials and giveaways. As an example we need to know how many visitor guides we have, who	IV A	23

		has requested them and the number they requested.		
7	What exactly is meant by “merge meeting space allocation into proposals and contracts?”	Taking the information we have created in the CRM system and being able to merge that information into a word doc or PDF. For example as we hold meeting space at the convention center, in and out times and set up we need to merge that information into our proposals and contracts.	IV A	24
8	How many internal users are expected?	35		
9	Which platform do you use for email currently? Microsoft 365, Google Workplace?	Outlook		
10	How many external users are expected?	30		
11	How many internal users are expected?	35		
12	Do you have a budget or a not-to-exceed dollar amount for this project?	We are looking for the best value out of the CRM system. Offerors can submit an IPRA request for current budget expenditures on current system.		
13	What are the primary pain points of the current system that you would like to see improved with a new system?	To reduce the redundancy in inputting data. Not having to input the same information multiple times.		
14	Do you have an anticipated budget for this project? If so, will you share the budget amount?	We are looking for the best value out of the CRM system. Offerors can submit an IPRA request for current budget expenditures on current system.		
15	Will this project require data migration from existing systems? If so, please describe the data, the number and type of records, the total size of the files, etc.	The project will require data migration, There are thousands of contacts that will need to be transferred to a new system. We do not have the file size information.		

16	How many existing systems will the solution need to integrate with?	One at this time.	IV A	24
17	Do the systems you wish this solution to interface with have APIs available? If so, are they available for review? If not, please describe integration capabilities.	APIs are available. We do not have them available for review. The API is connecting the CRM system to our website.	IV A	24
18	Are there any Security needs required to maintain the data? I.e., FEDRAMP and Audit requirements? If so, please describe.	No		
19	Does the city hold licenses for an electronic signature tool you would like to use as part of this solution? If so, please provide the name. If not, do you have a preferred tool or would you like this to be included in the proposal, if needed?	Adobe Sign		
20	Please elaborate on the city's preference for future systems maintenance. Does the city prefer future support and maintenance is done by the selected partner, internal team or a combination of both?	The CRM provider will be responsible for system maintenance, upgrades and support.	IV A	24
21	Is the vendor required to be on site for any portion of the contract term?	The Vendor will be required to provide training and onboarding of the system, onsite training is preferred.	IV A	24
22	Have you seen demonstrations of systems that would meet your needs prior to issuing this RFP? If so, will you share which systems?	Four years ago we received demonstrations from iDSS, Simpleview, Ungerboeck and Delphi.	IV C 4	27
23	Regarding the Scope of Work requirement that the system would "send RFP's to partners via an extranet system," would a distribution of a pdf or text document to an email list be acceptable?	Currently the RFP's are received by our partners via email. The extranet allows our partners to include their proposal within the system for tracking purposes.	IV A	24
24	Please provide the number of internal users who will need access to the system.	35		
25	Please provide the number of external users who will need access to the system.	30		

26	What are the main pain points in the current system that you would like the new system to resolve?	To reduce the redundancy in inputting data. Not having to input the same information multiple times.		
27	How many active users would need access to the CRM?	Internal 35, external 30		
28	<p>Could you please elaborate on the functionalities of the extranet system that the partners would be accessing? (Paragraph 3 of Section A - Detailed Scope of Work + Question 3, Bullet 6)</p> <p>a. Would they be using this portal to submit information through a form?</p> <p>b. What kind of information from the CRM needs to be accessible for these partners within this portal? Is this data specific data for each of these partners or common for all partners?</p>	<p>A. This function allows our hotel partners to submit their proposals, number of hotel rooms and dates. Allowing the TSF team to generate one proposal with all hotel partners proposals.</p> <p>B. Our partners need to access each individual RFP and is common for each partner.</p>	IV A	24
29	<p>How are BEOs currently managed? Is there a tool that currently manages the bookings that the CRM needs to integrate with or is this expected out of the CRM. (Question 3, Bullet 4)</p> <p>a. Could you please provide some scenarios and information that needs to be captured for booking/managing these event spaces on an hourly basis?</p>	<p>BEO's are currently managed within the CRM system and are linked to each booking. The Banquet Event Order (BEO) requires the following: Detailed list of all event set up needs per meeting room (tables, chairs, AV needs, staging, lighting, sound). Includes in and out times of the events. Food and Beverage needs and timing. Event layout/set up per room.</p>	IV A	24
30	What is the current billing/invoicing system in place that needs to be integrated with the CRM? (Question 3, Bullet 9)	The current billing/invoicing system is built into the current CRM system.	IV A	24
31	Are there any additional integrations that you expect? (Question 3, Bullet 10)	At this time the only integration with the CRM system is with our website.	IV A	24
32	<p>Inventory tracking (i.e. Visitors Guides, Dining Guides, Collateral, promotional materials, etc.) - (Question 2f)</p> <p>a. How is inventory tracking done today?</p> <p>b. Is there a system in place for the CRM to integrate or is this expected out of the CRM?</p>	<p>This is managed within our current CRM system.</p> <p>A. The information is entered into the CRM system manually and tracks our inventory.</p>	IV A	23

	c. If this is expected out of the CRM, what are the functionalities you are looking at from inventory management?	B. We expect the CRM system to provide the inventory management. C. Track all requests from individuals and partners and track inventory.		
33	Is there an intake form for people to rent space at the convention center? How do your customers, media, or partners reach out to you? (Question 3, Bullet 11)	On our meetings website, www.santafe.org/meetings/ we have tabs “Submit Your RFP” which allows both social and group inquiries provide there meeting request information. Most of our inquires come direct via email and phone calls.	IV A	24
34	What are the main channels that customers leverage for support or inquiries?	Customers reach us via email, phone and we have a submit your RFP www.santafe.org/meetings/ on the meetings landing pages on our website.	IV A	24
35	Are you also looking for a vendor who can handle more of the intake process for requests from the website?	No		
36	What KPIs are you looking to measure in customized reports? (Question 3, Bullet 3)	The ability to customize reports, date ranges, market types, group size, week day patterners, geographical location of leads, pace reports, etc. We need the most flexibility in looking at our data in the CRM system.	IV A	24
37	Would implementation start in 2023?	Yes		
38	What is your target go live date?	Q4 2023		
39	Would City of Santa Fe need to purchase through a partner (SHI, etc)?	No		

40	Currently, what is the incumbent tool/what tool is currently used by Santa Fe?	iDSS		
41	Are there any mandatory compliances and security guidelines to be fulfilled by the vendors?	No		