

## ATTACHMENT A

The Texas Manufacturing Assistance Center (TMAC) at the University of Texas at Arlington (UTA) is seeking Requests for Proposal for Microsoft Dynamics CRM 365 Solution Migration, Implementation and Training Services.

**RFP Release Date:** November 13, 2019

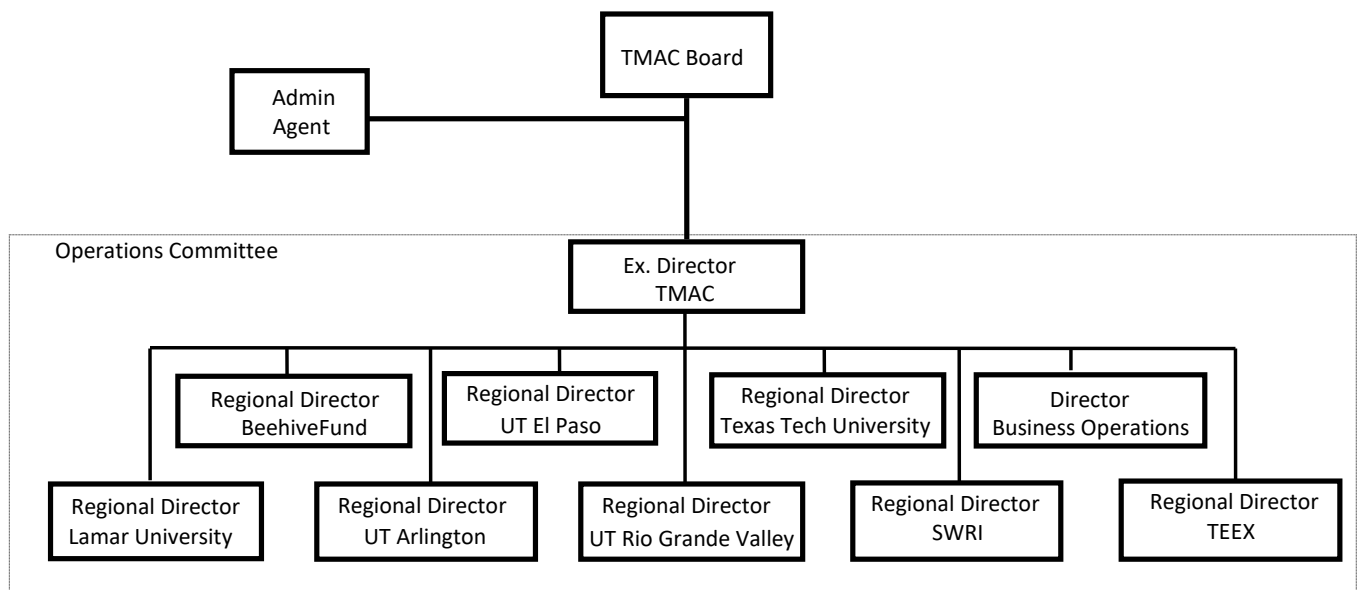
**Submittals Due Date:** 3 p.m. December 12, 2019

**Target Implementation:** February 01, 2020 through May 31, 2020

### 5.4.1 BACKGROUND

The Texas Manufacturing Assistance Center’s mission is to increase the global competitiveness of the Texas economy by working with the extended manufacturing enterprise to implement new technologies, techniques and best business practices. Approximately 70 TMAC employees, including 50 manufacturing professionals, work with a wide range of industrial firms located throughout eight Texas regions. Our particular emphasis is on the needs of small to mid-sized manufacturers. We deliver Lean, Quality, Strategic, Technology and Workforce Solutions.

#### TMAC Organizational Structure



TMAC is an affiliate of the Manufacturing Extension Partnership (MEP) program of National Institute of Standards and Technology (NIST). TMAC consists of eight partner institutions delivering services statewide. The Texas partners are: Beehive Fund; Lamar University; The University of Texas at Arlington; the Texas Engineering Extension Service (TEEX), part of The Texas A&M University System; The University of Texas at El Paso; Southwest Research Institute (SWRI); Texas Tech University; and The University of Texas – Rio Grande Valley.

#### **5.4.2 GENERAL DESCRIPTION OF SERVICES**

TMAC is seeking Microsoft Dynamics CRM 365 Solution migration, implementation and training services. It is the preference of the University for all services resulting from this RFP to be completed by June 30, 2020.

Proposer shall have extensive knowledge of Microsoft Dynamics CRM 365 and documented experience in implementing Microsoft Dynamics CRM 365, preferably for use in a consulting environment. Proposer shall also be capable and available to respond on an “on-call” basis and shall be responsible for acknowledging requests and responding for service within a reasonable time frame.

#### **5.4.3 SCOPE OF SERVICES**

TMAC intends to contract for Microsoft Dynamics CRM 365 services to support its statewide operation. The scope of work for this contract includes, but is not limited to, the following items. In the proposal, please provide basic steps and time to complete the step. Provide the estimated cost for each element listed below in your response to Section 6 of this RFP.

- Microsoft Dynamics CRM 365 solution
- Implementation of Microsoft Dynamics CRM 365
- Migration of data and customizations from TMAC’s existing CRM system, Microsoft Dynamics CRM 2011. Test and validate the migration works properly.
- Develop a full documentation that details the steps required to perform the configurations and migrations.
- Set up Dynamics CRM 365 for phones and tablets
- Hands-on training to TMAC staff, including “train the trainer” and individual training. Minimum of 2 onsite training sessions in Texas (location(s) TBD) and training materials required.
- Prompt and reliable response to project manager throughout implementation and training.

#### **5.4.4 TMAC/UTA TECHNICAL INFRASTRUCTURE**

##### **New System**

Hosting:	The University of Texas at Arlington Office of Information Technology (OIT)
TMAC Servers:	CRM Servers, SQL Servers. All email will be handled exclusively through the University email system.
Workstations:	Comprised of a mix of desktop and laptops Desktop and Laptops are running a mix of Windows 8 and 10
Backup:	Office 365 server; maintained by UT Arlington OIT.
Virus & Spam:	Server-based protection for both; maintained by UT Arlington OIT.

Portable Devices: TMAC staff utilizes a myriad of portable devices.

### **Current System (Dynamics CRM 2011)**

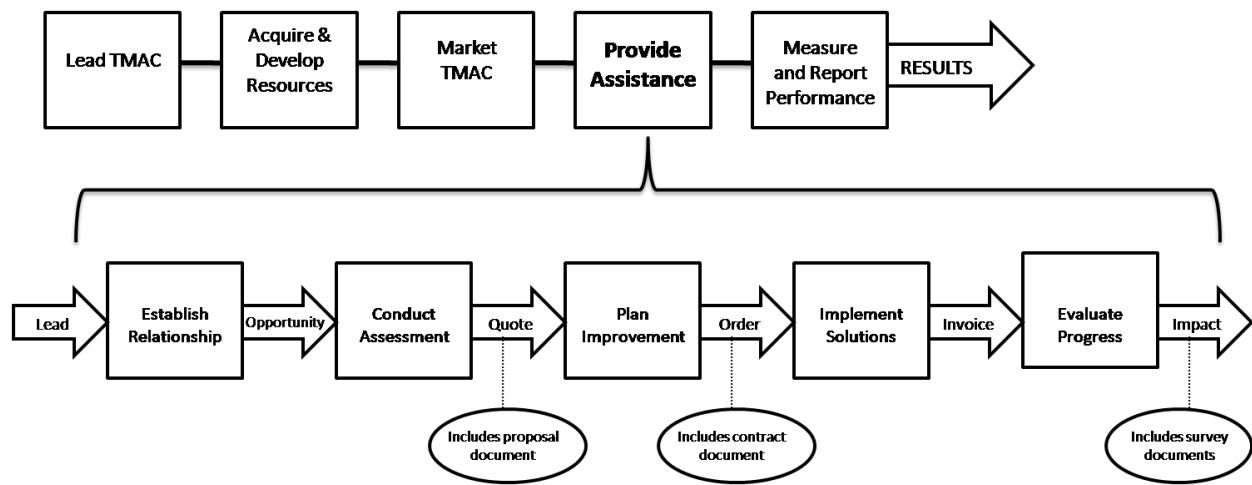
TMAC's CRM is configured for claims-based authentication and IFD (Internet-Facing Deployment). The system runs a SQL 2012 database and is on a Windows 2008 R2 server.

Customizations or modifications of CRM 2011 made to fit TMAC's business processes and reporting needs include:

1. Project management and time tracking capability accounting for both group and individual projects under each account
2. Reporting capability based upon NIST/MEP reporting requirements and management needs
3. Ability to segregate projects/activities by funding source

### **5.4.5 TMAC PROCESS**

The following diagram illustrates the 5 phases of the TMAC business process. The lower part of the chart details the key stages of the "Provide Assistance" phase and how they relate to the CRM. The output of the "Market TMAC" phase is a lead, which is the starting point for "Provide Assistance." The output of "Provide Assistance" is project impacts, which are inputs to the "Measure and Report Performance" phase.



#### Accounts

- TMAC is account driven. The account is the top layer. It is usually a company but could be an individual, organization or partner. Under accounts are projects with activities pertaining to those projects. There is one account manager for each account and there may be multiple project managers assigned to the different projects under the account. Each account has a unique ID, to be assigned by the system as new accounts are created.

#### Activities

- Tasks performed in support of the TMAC business processes. There are a number of activity classifications, some of which are associated with projects. Other types of activities pertain to marketing, program administration, etc.

#### Individual Projects

- An individual project is performed for one customer and is associated with a single account. Each project has a project manager. Project IDs are assigned automatically at the opportunity stage.

#### Group Projects

- A Group Project is conducted with multiple companies. A Group Project and its associated activities are therefore linked to multiple accounts. Time charged to Group Projects must be correctly aggregated, i.e. a 20-hour project with 5 participating companies equals 20 project hours, as opposed to five 20-hour Individual Projects which total 100 project hours. Activity entries made to the Group Project must automatically post to the account record of each participating company. Group project IDs are assigned automatically at the opportunity stage.

#### Impact Results Process

- TMAC customers are surveyed once a year on completed projects. The CRM system must be able to capture projected impacts at time of project completion as well as store actual survey results obtained from an outside survey contractor. Impact reports by region, project manager, project type, and by actual versus projected impacts are needed. There is an existing impact analysis tool available that we would like to integrate into the CRM.

#### NIST Quarterly Reporting

- Project Information File (PIF)  
The purpose of the PIF is to capture substantive work that will be surveyed. The PIF contains one record for each substantive project or group project completed during a calendar quarter. PIF records are used to provide descriptive information to NIST MEP regarding the types of projects and events in which TMAC engaged customers during a particular quarter.

TMAC submits the PIF as an Extensible Markup Language (XML) file. The PIF contains one record for each substantive project/event completed during a certain period. Projects are reported with a single customer ID and group projects have multiple client IDs per record.

- Customer Information File (CIF)  
The CIF includes basic data on each customer, including company name, address, contact person, and several characteristics such as number of employees and NAICS code. The CIF is submitted as an XML file.

#### Region-Specific Reporting

- TMAC is one organization with eight operating regions. Reporting must be designed for the regional level as well as the TMAC overall operational level.

#### TMAC Management Reporting

- TMAC must be able to run reports by the overall operation as well as each individual region and business unit such as by Centers of Excellence. Reports would include time and project reports as well as financial reports.

#### Staffing Reports

- As part of the project management requirement, all time spent on projects must be recorded to specific projects or to overhead/administrative functions. From this, time reports should be available by staff member, by region and by account/company.

#### Associating Activities with a Finite Engagement

- All activities must be associated with an account, recorded either to a specific project or to overhead. All projects must have a final engagement or close-out.

### **5.4.6 CONSULTANT CONTRACT ADMINISTRATION**

All communications during the proposal process must go through Kristopher Kizer, Contract Specialist at [Kristopher.Kizer@uta.edu](mailto:Kristopher.Kizer@uta.edu). Once an award is made, communications should be directed to Richard Curry ([Richard.Curry@tmac.org](mailto:Richard.Curry@tmac.org)) with a carbon copy to Jose Reyes ([Jose.Reyes@tmac.org](mailto:Jose.Reyes@tmac.org)) and Mei-hwa Huang ([Mhuang@tmac.org](mailto:Mhuang@tmac.org)).

- Budgets shall be based on negotiated rates and the work to be performed.
- Contract shall include milestones and specific deliverables; including a project schedule
- Budget should break out costs for specific deliverables
- Any changes to scope or budget must be approved in advance by UTA

### **5.4.7 PROPOSAL CONTENT**

***The proposal shall not exceed 16 total pages*** in length including cover letter, proposed staffing plan, previous experience, proposed project approach, proposed implementation approach, project schedule, proposed training approach, respondent questionnaire and references. No appendices or elaborate brochures or other presentation material are desired. The proposal should be organized in the following sequence.

**Cover Letter** - Describe the firm or team's interest in and commitment to the project.

**Proposed Staffing Plan** - Designate the Project Manager in charge of the project, and the TMAC contact throughout the duration of the contract. The proposal should describe the individuals and their roles on the team. Identify key staff members and a brief resume describing similar projects on which they have been involved, availability of the staff member over the duration of the project and a description of the benefits the person brings to the team. Proposals shall clearly establish principal team members and sub consultants, if used. An organization chart should be included. Any substitution of key staff during the project shall require notification and approval from UTA. Evaluation of this segment of the RFP will be focused on individual members as well as the depth of your proposed team.

**References** – Include descriptions of relevant projects previously performed by the staff proposed. The descriptions should include what services were performed, the date of the project, unique features of the project which would be beneficial to TMAC. Client references,

especially government organizations, including email and phone contact information should also be submitted.

**UT System, GPO, DIR:** List any active agreements that provide same services requested in this RFP. Include contract reference number, contract contact information and any other relevant reference information.

**HUB Status** – State your company’s HUB status.

**Proposed Approach** - Provide a general explanation of the approach you would take for completing the work, addressing the tasks above and identifying the deliverables. In addition, provide a general list of additional tasks necessary to complete the work.

**Proposed Training Approach** – Provide a general explanation of the approach you would take for Microsoft Dynamics CRM 365 training to seven different locations with staff members of different technical and software levels. **Clearly identify individuals who would be responsible for training, noting any certifications they have earned.**

**Respondent Questionnaire** – Provide answers to the attached questionnaire.

**Estimated Costs** – As part of your response to Section 6: Pricing and Delivery Schedule, submit a detailed plan with a quote for each section based on the key components listed above under *Scope of Services*. Stipulate that the rates are valid for the duration of the contract term.

#### **5.4.8 RESPONDENT QUESTIONNAIRE**

Respondents are requested to submit a complete response to each of the below listed items. Responses requiring additional space should be brief and submitted as an attachment to your Proposal package.

#### **Company Profile**

1. Number of years in Business: \_\_\_\_\_  
Type of Operation: Individual: \_\_\_\_\_ Partnership: \_\_\_\_\_ Corporation: \_\_\_\_\_  
Government: \_\_\_\_\_  
Number of Employees: \_\_\_\_\_  
Annual Sales Volume: \_\_\_\_\_
2. Provide a customer reference list of no less than three (3) organizations with which Respondent currently has contracts with and/or has previously provided software services of equal type and scope within the past two (2) years. Reference list should include company name, contact person, and telephone number, description of products and services provided, and length of business relationship.
3. Does any relationship, whether by relative, business associate, capital funding agreement or any other such kinship exist between your company and any TMAC employee? If yes, please explain.

### **General Requirements**

4. What challenges do you anticipate in serving TMAC and how do you plan to manage these? What assistance will you require from TMAC?
5. Would prefer company have an office in DFW area. Please provide address and contact information.
6. Must be Microsoft Certified Partner

### **Service Support and Warranty**

7. Describe your company's service support philosophy, how is it carried out, and your average response time. Provide hourly rate for service support.
8. Provide a schedule of your service hours and average response time. Include hourly service rates.

### **Quality Assurance**

9. Describe your company's quality assurance program and how you measure customer satisfaction. What are your company's requirements, and how are they measured?

### **Added Value**

10. Provide a list of any services not specified in this RFP that your company will provide to TMAC as part of the system development and implementation.
11. Provide details regarding any special services/benefits offered or advantages in UT Arlington/TMAC selecting your company.

### **5.4.9 Project Management Phases**

- **Initiation/Planning Phase:**
  - During initiation/planning Identify implementation of Microsoft Dynamics CRM 365 scope and requirements.
  - Develop implementation schedule for migration.
  - Identify project team, deliverables and milestones.
  - Create risk, communication and change order plans.
- **Execution Phase:**
  - Execution involves the development and completion of deliverables.
  - Work is verified and approved by UTA.
  - Knowledge transfer occurs.
  - Migration of data and customization from existing CRM System to Microsoft Dynamics CRM 2011.
  - Test and validate the migration works properly.
  - Develop full documentation that details steps required to perform the configurations and migrations.
  - Setup Dynamics CRM 365 for phones and tablets.



- **Monitoring & Training Phase:**
  - The contractor will be expected to participate in periodic Project Status Report meetings to review progress and performance against the timeline and deliverable schedule. These meetings will be in addition to ongoing monitoring and observations made by project stakeholders.
  - The vendor's trainers will train UTA's TMAC and partner staff.
  - The vendor should include in their response to UTA the following:
    - How many employees the vendor will train initially,
    - How many employees will the vendor train total,
    - What topics will be trained, and
    - Whom, in their experience, should receive said training

### ***Training Content***

- The successful vendor must have their own training content, or be willing to create and modify content based on the needs of UTA, and feedback from employees and UTA staff.

### ***Training Format(s)***

- Training formats will be a combination of the following: however a Webinar will require discussion and agreement from UTA's TMAC Department.
  - Classroom / Instructor-led – offered in train the trainer and individual training
  - Blended learning – combining face-to-face classroom with e-learning activities to form an integrated instructional approach
  - Webinar – interactive, web-based video conference, with interactive tools and approaches to engage learners and enhance learning.

### ***Training Duration & Size***

- Training duration must be shorter learning modules (i.e. one-two hour(s), half day, full day).
- The number of attendees for all courses must be mutually agreed upon prior to scheduling the training course. The number of attendees will be determined based on a number of factors including – topic, training activities, format, location / room restrictions, etc.

### ***Training Schedule***

- The successful vendor must be available to provide initial training during regular business hours (Monday – Friday, 8AM – 5PM).

### ***Training Materials***

- Vendor/trainers must prepare and provide all course materials, which includes guides, handouts, exercises, job aides, etc. The cost of materials must be included in the total cost of the proposal.
- Training Material must be provided in a digital format / copyright free for use by UTA as it sees fit, with the final version of training material due at the end of the project;
  - At a minimum this will be a quick reference guide or equivalent “1-page” cheat-sheet. Preferably there will be a formatted manual with the following:
    - Step-by-step guides,
    - Images of functions to be performed,
    - Sections based on user roles as they relate to using the devices, software, applications, and
    - Created in a standard tool that UTA already has access to
- **Closeout Phase:**
  - During the closeout phase, the university will confirm that all required deliverables have been completed timely and meets satisfaction.