

# **IT Professional Technical Services Master Contract Program T#:902TS**

## **Statement of Work (SOW) For Technology Services Issued By**

**Minnesota IT Services (MN.IT Services)**

**Project Title: DHS Microsoft Dynamics CRM**

### **Service Categories:**

Vendor must be approved in one of the following categories:

- **Desktop - Application (Design & Development)**
- **Architecture Planning & Assessment – Technical**

### **Business Need**

DHS operates several contact centers, currently utilizing BMC Service Desk Express (SDE) software for customer / contact management. Service Desk Express will soon be no longer supported by BMC, therefore DHS has established a plan to migrate these call centers to new software. MNsure has selected Microsoft Dynamics CRM for the contact management software used by their call center, and DHS has chosen to use this software as the replacement platform for the DHS Contact Centers. This software is the CRM standard recommended by MN.IT Central.

This software has been installed on infrastructure hosted at DHS, and has been configured and implemented for use by the MNsure Contact Center. This software implementation must be expanded to include the DHS Minnesota Care, MMIS, MN.IT/MMIS Tier II, and Member help desks in order for these contact centers to provide interactive support for the MNsure call center. The DHS contact centers will be functioning as a virtual contact center providing support for the MNsure contact center. These contact centers will be using the same hosted Microsoft Dynamics CRM software as the MNsure contact center. They will require modifications to fit their business process, but the plan will be to share the same Organization as MNsure. The contact centers will also require seamless transfer of calls between the MNsure and DHS virtual contact centers, and screen pops of the CRM software.

The contractor will assist in providing the solution architecture and design as well as mentoring DHS technical support staff in best practices and ongoing support of the Microsoft Dynamics CRM software for the DHS Contact Center Project. The contractor must understand the existing implementation of CRM for MNsure and provide architectural direction to best connect with the DHS contact centers.

DHS technical staff will be completing the actual configuration and implementation of the CRM software changes. The vendor will be expected to be an expert in architecture and configuration of the tool, and will provide guidance, assistance, and best practice advice throughout the process. The vendor will also provide support training, and post-implementation support on a time and materials basis.

Stakeholders include:

<b>Name</b>	<b>Role</b>
Scott Peterson	Sponsor
Rachel Cell	Member and Provider Services Director
Karen Gibson	Health Care Eligibility and Access Director
Pam Daniels	HCEA Planning Manager
Theresa Kohn	HCEA Program Improvement Manager
John Welch	Member Contact Center Manager
Mary Jo Alhgren	HCEA Operations Manager
Mark Rausch	HCEA Program Improvement Supervisor
Wendy Weisner	DHS Project Manager
Mark Curran	Developer / CRM Support
Will Du Chene	Developer / CRM Support
Laura Michelson	Supervisor-Enterprise Applications /CRM support
Carol Kehner	MNSure Contact Center Manager
Dave Patterson	VOIP and IVR Technical Support

## Project Deliverables

- Identify potential system integrations with Dynamics CRM
- Define the technical environment and deployment options in which the requested system solution will operate.
- Analyze and recommend development approach
- Analyze and recommend any components, plug-ins, or add-ons, etc. that may help with the implementation.
- Identify business processes currently not supported by technology that could be supported by Dynamics CRM.
- Provide best practice and expert guidance on development of CRM solution
- Train DHS business staff on Microsoft Dynamics CRM
- Train DHS technical staff on support requirements for CRM
- Functional and technical design documentation

Introduction	Conduct an initial investigation of Microsoft Dynamics CRM environment at DHS to become familiar with installation. Recommend any initial changes based on best practices.
Requirements Documentation and Review	Review functional requirements for each DHS contact center, document and finalize success criteria.
Design and Architecture	Develop the high-level architecture for the system, determining how it will support each of the processes in the project scope. Conduct a gap analysis to identify which solutions can be delivered via configuration and which requirements would involve customization or extension. Design security model.
Infrastructure Planning	Analyze and document network infrastructure, authentication, and security that will support the CRM and its integrated technologies.

Functional Design Specifications	Document the core functions of the architected system, as well as users and security model. This may include charts and diagrams modeling the system architecture, samples or mockups of reports, and diagrams of automated processes (workflows).
Technical Design Specifications	Determine development approach, define data ownership, integration, data migration etc.
High Level Project Scope and Project Plan	Create high level project plan from the Detail Level Project Scope with tasks, dependencies, milestones and resource allocation.
Implementation assistance	Provide active assistance during implementation of application, having technical resources available for guidance, direction, and troubleshooting.
Training	Create and present a training plan for the DHS virtual contact center version of Microsoft Dynamics CRM. Training will be business specific and geared to how to use the customized CRM for each business area. Train supervisors, trainers and contract center representatives on how to use Microsoft Dynamics CRM. Provide training materials to DHS for ongoing training use.
Post Implementation Support	Provide post implementation support on a time and materials basis.

## Project Milestones and Schedule

- Project Estimated Start: January 31. Other estimated milestone dates are:
- Design and build: Complete by March 31, 2014
- Test and Validate: April 30, 2014
- Training and deploy: May 15, 2014
- Post Implementation Support through end of June 2014

The term of any resulting work order will be limited to a term not greater than one-year from the date of final execution anticipating the completion of the existing master contract. The State reserves the right to transition any resulting work order to the new master contract program subject to its terms and conditions which will replace the current program. If such a transition is not possible, the contracting entity will work with MN.IT and the Department of Administration to review options to enable the continuation of the services being provided to the extent possible.

## Project Environment (State Resources)

- A. MN.IT Services has two technical resources primarily responsible for CRM support for the DHS business that would be considered advanced level in their knowledge of contact management software.
- B. The vendor will also interact during the course of this contract with the enterprise applications manager, with managers and directors of the DHS call centers being implemented, with MNsure contact center managers, and with the DHS CRM project manager.

- C. The environment consists of dual IIS servers on Windows 2012 servers load-balanced by F5 load-balancer, SQL Server 2012 database server with a high availability cluster (active/passive), and two application process engines on Windows 2012 servers. Environments include DEV, QA-Test and Production.
- D. The Microsoft Dynamics application is shared between DHS and MNsure. Currently two organizations are in production use – MNsure and MNsure Escalation Center.

## Agency Project Requirements

- The software will be configured to utilize or interface with the existing CRM application/organization being used by the MNsure contact center. It is essential that care and planning be taken such that MNsure implementation is not negatively affected, and that the new contact centers integrate well with the MNsure contact center.
- DHS will be responsible for defining the business requirements prior to the start of the configuration project. DHS will use standard Dynamics CRM functionality where reasonably possible.
- DHS technical staff who will be providing ongoing support for the software must be included in all technical planning, architecture and design. DHS staff will make the actual changes to the application, with the advice and guidance of the vendor.
- The CRM environment and staff involved in this project are all located at 540 Cedar St., St Paul, MN. The vendor can work remotely, but will be at this location when necessary.
- DHS technical staff will be trained in order to provide ongoing support of the CRM software.
- DHS contact center staff will be trained in use of the software specific to the particular instance used by their call center(s).
- Work done will comply with DHS software, security, accessibility and architectural standards.

## Responsibilities Expected of the Selected Vendor

- Vendor will work with manager of enterprise applications and CRM project manager to plan meetings.
- Vendor will provide a written monthly report recapping project milestones and status, issues, actions and resolutions, and post-implementation support calls, including, but not limited to, call issue, resolution, persons involved, and time spent.
- Vendor will work directly with DHS technical staff in the design and implementation of the software. Vendor will provide architectural and best practice advice and guidance. Vendor will have staff available to answer questions from technical staff throughout contract.
- Vendor will provide assistance in the software implementation, but the actual implementation will be done by DHS technical staff.
- Vendor will provide training and documentation to MN.IT Services technical staff for technical configuration and procedures. This training can occur during planning and implementation phase, and can be on-site one-on-one mentoring, or one day of formal training. Vendor will provide training and documentation to DHS contact centers for CRM software use and procedures. This training will be completed after the system development has been completed, and prior to going live. The training will be specific to use of the DHS specific solution. Approximately 8 hours of training will be expected.

- Vendor will provide post-implementation support in a block of 50 support hours available through June 30, 2014.

## Required Skills (to be scored as pass/fail)

If a vendor can't provide supporting documentation to meet the requirements below, their proposal may be removed from further consideration.

- Vendor must be **approved in at least ONE of the Service Categories** (Master Contract resource type(s)/ categories) listed on the cover page of this proposal.
- Vendor must provide documentation showing they are a **Microsoft Certified Vendor**.
- Vendor must provide documentation showing all technicians working on this contract have expert-level experience with **Microsoft Dynamics CRM 2011**.
- Vendor must have experience configuring **Microsoft Dynamics CRM 2011** with contact centers of various size.
- Vendor must provide at least three client reference where vendor provides/provided similar support as described in this Statement of Work.

## Desired Skills

If a vendor can demonstrate the following, additional points may be added to their overall score. A vendor does not need to have all of these skills/experiences in order to submit a proposal.

- History / experience with the MNsure design for the installation of Microsoft Dynamics at DHS.
- Technical resources local to the Minneapolis/St. Paul area.
- Vendor must have demonstrated track record of success

## Process Schedule

- Deadline for Questions Monday, January 13, 12:00 pm (noon) CST
- Posted Response to Questions (anticipated) Wednesday, January 15, 12:00 pm (noon) CST
- **Proposals due Thursday, January 16, 5:00 pm CST**
- Anticipated proposal evaluation begins Tuesday, January 21, 2014
- Anticipated proposal evaluation & decision Friday, January 24, 2014

## Questions

Any questions regarding this Statement of Work should be submitted via e-mail by 01/13/2014, noon:

Mark Curran  
 MN.IT @ DHS  
 651-431-2104  
 Mark.s.curran@state.mn.us

Questions and answers will be posted on the Office of MN.IT Services website by approximately 01/15/2014, noon ([http://mn.gov/buyit/statements/mcp902ts\\_active.html](http://mn.gov/buyit/statements/mcp902ts_active.html)).

## SOW Evaluation Process

- Work Plan (15%)
- Immediate availability to begin project (5%)
- Expert knowledge of the Microsoft Dynamics CRM product (30%)
- Knowledge of the MNSure CRM implementation (10%)
- Three References (10%)
- Cost (30%)

**Statement of Work does not obligate the state to award a work order or complete the assignment, and the state reserves the right to cancel the solicitation if it is considered to be in its best interest. The Agency reserves the right to reject any and all proposals.**

## Response Requirements

### Submission Format

Separate your proposal into the following sections. **Do not** include any information not requested, such as cover letters, marketing materials, etc.

#### **Section 1: Cover page with only the following information:**

Vendor Company Name  
Address  
City, State, Zip  
Company Contact Person  
Contact person's email & phone information

#### **Section 2: Understanding of project and Work Plan**

- A. Describe your understanding of the project, your approach, milestones and timelines to be followed. Include expected start and end dates for each milestone.
- B. Describe any assumptions or constraints you feel could impact this project.
- C. Based on your company's implementing Microsoft Dynamics CRM, describe any changes or additional support/tasks you feel should be included in order to maximize this contract.
- D. Based on the details from this SOW as well as your experience implementing Microsoft Dynamics CRM, what do you feel will be the biggest challenge in completing this assignment? How do you plan on addressing this challenge?

*15% of overall score + 5% for immediate availability*

#### **Section 3: Company background & project team and experience with CRM**

- A. Describe your company's background in projects similar/the same as described in this Statement of Work with particular attention to projects where Microsoft Dynamics CRM was installed in a contact center environment (NOT A SALES ENVIRONMENT). An *extensive* history of providing similar support as described in this Statement of Work will be worth additional points.
- B. Describe your company's team that will be working on this project / providing remote or on-site assistance and support. A general description of your organization should be included.

- C. State where the remote support technicians are located. Technical resources local to the Minneapolis/St. Paul area are desired, but not required.
- D. Attach documentation showing your company is a **current Microsoft Certified Vendor**.

*30% of overall score + 10% for MNsure*

### Section 4: Client References

A. List at least three references for work specific to this Statement of Work. Include:

- reference name
- company name and address
- direct phone to reference
- direct email address to reference

It will be up to the vendor to tell references that they may be called.

*10% of overall score*

### Section 5: Cost

Provide costs for each. For fixed price quotes, provide the estimated number of hours and the hourly rate included in that quote.:

1. Design and architect the Microsoft Dynamics CRM solution to be used by the Minnesota Care, Member and MMIS contact centers. Design solution to interact with existing MNsure CRM solution securely and seamlessly. Include call transfers and screen pops.

**Fixed price, project price =** \_\_\_\_\_

**Number of hours** \_\_\_\_\_ **Hourly rate =** \_\_\_\_\_

2. Provide Training for Supervisors and Call Center Trainers

**Number of hours** \_\_\_\_\_ **Hourly rate =** \_\_\_\_\_

**Fixed price =** \_\_\_\_\_ **(Describe number of hours of training included)**

3. Provide active implementation support for first DHS implementation of CRM software, while allowing MN.IT Services technical staff to execute the implementation. Provide planning, process, guidance, oversight, troubleshooting.

**Fixed price =** \_\_\_\_\_

**Number of hours** \_\_\_\_\_ **Hourly rate =** \_\_\_\_\_

4. Provide post go-live support on a time and materials basis after completion of installation for first contact center.

**50 hours @ Hourly rate =** \_\_\_\_\_

*30% of overall score*

### Section 5: State Forms

- a) Conflict of Interest Statement A statement certifying there are no known conflicts of interest with respect to this project, or if known, identification of those situations that may present an actual or potential conflict and how the contractor proposes to avoid the potential conflict.

- b) Affirmative Action Certificate of Compliance  
<http://www.mmd.admin.state.mn.us/doc/affaction.doc>
- c) Affidavit of non-collusion <http://www.mmd.admin.state.mn.us/doc/noncollusion.doc>
- d) Immigration Status Certification <http://www.mmd.admin.state.mn.us/doc/immstatcert.doc>
- e) Location of Service Disclosure  
<http://www.mmd.admin.state.mn.us/Doc/ForeignOutsourcingDisclosureCertification.doc>
- f) Certification Regarding Lobbying <http://www.mmd.admin.state.mn.us/doc/lobbying.doc>
- g) Veteran-Owned/Service Disabled Veteran-Owned Preference Form  
<http://www.mmd.admin.state.mn.us/doc/vetpref.doc>
- h) Resident Vendor Form (if applicable)  
<http://www.mmd.admin.state.mn.us/doc/residentvendorform.doc>
- i) Targeted Group Preference Form

## Proposal Submission Instructions

- Email 1 copy of the proposals to the following email address no later than the time/date noted in the *Process Schedule* above: [Laura.Michelson@state.mn.us](mailto:Laura.Michelson@state.mn.us) Subject line of the email should read: { *Vendor Name* } – Microsoft Dynamics CRM @ DHS Proposal. Vendors must submit responses directly to Laura Michelson. This may be done via an attachment to e-mail, or timely delivery of hard copies to Laura Michelson @ Department of Human Services, 540 Cedar St, St Paul, MN 55155 by the required time and due date.

## General Requirements

### Proposal Contents

By submission of a proposal, Responder warrants that the information provided is true, correct and reliable for purposes of evaluation for potential award of a this work order. The submission of inaccurate or misleading information may be grounds for disqualification from the award as well as subject the responder to suspension or debarment proceedings as well as other remedies available by law.

### Liability

#### Indemnification

In the performance of this contract by Contractor, or Contractor's agents or employees, the contractor must indemnify, save, and hold harmless the State, its agents, and employees, from any claims or causes of action, including attorney's fees incurred by the state, to the extent caused by Contractor's:

- 1) Intentional, willful, or negligent acts or omissions; or
- 2) Actions that give rise to strict liability; or
- 3) Breach of contract or warranty.

The indemnification obligations of this section do not apply in the event the claim or cause of action is the result of the State's sole negligence. This clause will not be construed to bar any legal remedies the Contractor may have for the State's failure to fulfill its obligation under this contract.

### Disposition of Responses

All materials submitted in response to this SOW will become property of the State and will become public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. Pursuant to the statute, completion of the evaluation process occurs when the government entity has completed negotiating the contract with the selected

vendor. If the Responder submits information in response to this SOW that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minn. Stat. § 13.37, the Responder must: clearly mark all trade secret materials in its response at the time the response is submitted, include a statement with its response justifying the trade secret designation for each item, and defend any action seeking release of the materials it believes to be trade secret, and indemnify and hold harmless the State, its agents and employees, from any judgments or damages awarded against the State in favor of the party requesting the materials, and any and all costs connected with that defense. This indemnification survives the State's award of a contract. In submitting a response to this RFP, the Responder agrees that this indemnification survives as long as the trade secret materials are in possession of the State.

The State will not consider the prices submitted by the Responder to be proprietary or trade secret materials.

### **Conflicts of Interest**

Responder must provide a list of all entities with which it has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this request for proposals. The list should indicate the name of the entity, the relationship, and a discussion of the conflict.

The responder warrants that, to the best of its knowledge and belief, and except as otherwise disclosed, there are no relevant facts or circumstances which could give rise to organizational conflicts of interest. An organizational conflict of interest exists when, because of existing or planned activities or because of relationships with other persons, a vendor is unable or potentially unable to render impartial assistance or advice to the State, or the vendor's objectivity in performing the contract work is or might be otherwise impaired, or the vendor has an unfair competitive advantage. The responder agrees that, if after award, an organizational conflict of interest is discovered, an immediate and full disclosure in writing must be made to the Assistant Director of the Department of Administration's Materials Management Division ("MMD") which must include a description of the action which the contractor has taken or proposes to take to avoid or mitigate such conflicts. If an organization conflict of interest is determined to exist, the State may, at its discretion, cancel the contract. In the event the responder was aware of an organizational conflict of interest prior to the award of the contract and did not disclose the conflict to MMD, the State may terminate the contract for default. The provisions of this clause must be included in all subcontracts for work to be performed similar to the service provided by the prime contractor, and the terms "contract," "contractor," and "contracting officer" modified appropriately to preserve the State's rights.

### **IT Accessibility Standards**

All documents and other work products delivered by the vendor must be accessible in order to conform with the State Accessibility Standard. Information about the Standard can be found at: <http://mn.gov/oet/policies-and-standards/accessibility/>.

### **Preference to Targeted Group and Economically Disadvantaged Business and Individuals**

In accordance with Minnesota Rules, part 1230.1810, subpart B and Minnesota Rules, part 1230.1830, certified Targeted Group Businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal, and certified Economically Disadvantaged Businesses and individuals submitting proposals as prime contractors will receive a six percent preference in the evaluation of their proposal. Eligible TG businesses must be currently certified by the Materials Management Division prior to the solicitation opening date and time. For information regarding certification, contact the Materials

Management Helpline at 651.296.2600, or you may reach the Helpline by email at [mmdhelp.line@state.mn.us](mailto:mmdhelp.line@state.mn.us). For TTY/TDD communications, contact the Helpline through the Minnesota Relay Services at 1.800.627.3529.

### **Veteran-Owned Preference**

In accordance with Minn. Stat. § 16C.16, subd. 6a, (a) Except when mandated by the federal government as a condition of receiving federal funds, the commissioner shall award up to a six percent preference on state procurement to **certified small businesses** that are **majority-owned and operated by**:

- (1) recently separated veterans who have served in active military service, at any time on or after September 11, 2001, and who have been discharged under honorable conditions from active service, as indicated by the person's United States Department of Defense form DD-214 or by the commissioner of veterans affairs;
- (2) veterans with service-connected disabilities, as determined at any time by the United States Department of Veterans Affairs; or
- (3) any other veteran-owned small businesses certified under section [16C.19](#), paragraph (d).

In accordance with Minn. Stat. § 16C.19 (d), a veteran-owned small business, the principal place of business of which is in Minnesota, is certified if it has been verified by the United States Department of Veterans Affairs as being either a veteran-owned small business or a service disabled veteran-owned small business, in accordance with Public Law 109-461 and Code of Federal Regulations, title 38, part 74.

To receive a preference the veteran-owned small business must meet the statutory requirements above by the solicitation opening date and time.

If you are claiming the veteran-owned preference, **attach documentation, sign and return the Veteran-Owned Preference Form with your response to the solicitation.** Only eligible veteran-owned small businesses that meet the statutory requirements and provide adequate documentation will be given the preference.

### **Foreign Outsourcing of Work Prohibited**

All services under this contract shall be performed within the borders of the United States. All storage and processing of information shall be performed within the borders of the United States. This provision also applies to work performed by subcontractors at all tiers.