CRM RFP QUESTIONS AND ANSWERS

#	Question	Comments
1	What is the expected number of users of the new PFM CRM system? We expect about 35 currently, but we wish to prepare for growth. Therefore, we would also like to see pricing for a variety of users (i.e. 50, 75).	
2	Please define different roles/personas requirements for using the PFM CRM system? We anticipate 2-3 persons in IT roles to have full access. Further, we expect 1-2 “super users” that would manage data input across all asset classes as needed. Outside of these users, we expect each asset class to have their own private environment. This is especially important for the private asset classes (real estate, infrastructure, natural resources, private credit and private equity) which often have material nonpublic information. Our legal and compliance teams (part of the investment staff) would also require private environments.	
3	Please explain the role of the external managers and their interaction with the system? What level of system access do they require? We don’t envision system to system integration on a direct basis. But we do envision forms/surveys being sent out to external managers and having the system be able to tabulate such data.	Section II, 2h Page 5
4	Please provide the types and quantities of supported mobile devices by PFM. Laptops, tablets, and cell phones would be the mobile devices to expect. On average each user has at least all 3.	
5	Will you require importing historical data/records? If yes ,what format/s is the historical data in? What is the size of the date to migrate? Yes. Historical data is stored in typical Microsoft Office formats. We currently use 50 GB.	
6	What is the policy on staffing offshore resources? We would have to receive more information on the offshore resources. The use of offshore resources could implicate additional compliance and legal requirements.	
7	Please share a list of data sources which will feed to the new PFM CRM system. This will vary but will include our investment custodian (State Street), manager portals (example Intralinks) and manual uploads by PFM staff.	Section II, 2c Page 4

8	Will all data required from other systems need to be processed in real time? We don't envision all data needing to be processed in real time but would like the data processed as quickly as possible. Please describe your organization's time needs.	Section II, 2c Page 4
9	What is the single sign on tool currently used by the Office of Treasurer? Windows Authentication via DAS/Statewide Active Directory.	
10	Please elaborate "Utilize plug-ins to the full Microsoft Office Suite and PDFs". We wish to ensure that the system can work with documents commonly supported by Microsoft (.docx, .xlsx, .pdf etc.)	
11	Please explain "add data via custom columns" in the Research Management section. We would like to have customization capability.	Section II, 2f Pg 5
12	Does the Vendor need to provide Level 1 (Helpdesk) support to end users? If yes, then what is the expected volume of calls the helpdesk expects to receive? The volume is to be determined as this is our first implementation of a CRM system. Indicate what volume you typically expect with your service during implementation and then thereafter.	
13	What are the total number of questionnaires required for RFI/RFP? We expect to issue several a year for various investment strategies, projects, software etc. This is a critical component of our procurement process.	Section II, 4f Page 5
14	Please provide the current number of files and size of data servers. We currently use 50 GB.	Section ll page 4
15	Please provide any external tools you are currently considering for your environment. We are in the process of upgrading our technologies. Please detail tools you do and do not support.	Section ll page 4
16	Can the deadline for the RFP Response be delayed one week to give us time to fully incorporate the answers to the questions? No. We regret that it is not possible at this time given our procurement policies.	
17	Who is your current CRM service provider?	

	None. We do not use a CRM currently.	
18	Is the incumbent invited to re-bid? N/A, see response in Question 17.	
19	Are all of the attributes and abilities listed under Section II. 1. a. through j. required in order to be considered for this mandate? We will consider candidates that satisfy most of the requirements in the Section listed. We encourage vendors with most of those attributes to bid.	
20	Will you require all historical data (emails, notes, attachments) to be uploaded to the CRM system? Yes, we would require that historical data be uploaded into the system. At the very least the last 10 years.	
21	Whether companies from Outside USA can apply for this? (like, from India or Canada) Yes, we accept responses from outside the U.S. All respondents need to comply with the RFP requirements as stated in the RFP.	
22	Whether we need to come over there for meetings? We don’t envision requiring in-person visits during the RFP process. However, we anticipate in-person assistance during the implementation stages and periodically for training.	
23	Can we submit the proposals via email? Yes, email is preferred. Please submit to pfm.rfp@ct.gov with the subject line “CRM Services RFP.” More detail can be found in Section VIII Part A of the RFP.	