MassCEC – Customer Relationship Management System & Services

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AGENDA

- **About MassCEC**

- **Priority Solutions and Objectives**

- **Needed Capabilities and Expected Outcomes**

- **Scope of Work and Requirements**

- **How to Apply: Application Packet**
    - **Cover Letter**
    - **Proposal**
    - **Vendor Response answers**
    - **Attachment 1: Acceptance form**
    - **Attachment 2: Agreement for services**
    - **Additional voluntary information**

- **Timeline – MassCEC will respond to all Q's by 4/7**

- **Decision Inputs**

- **Takeaways**

- **Questions & Answers**

MassCEC's Work Spans Four Main Areas of Climate Impact for MA

Climatetech Innovation & Investment	Accelerating Decarbonization	Large Scale Deployment: Offshore Wind	Clean Energy & Climate Workforce Development
We're helping new climate-focused businesses grow faster through direct support and by creating an ecosystem where they connect and thrive.	**We're tackling barriers to widespread use of clean energy and climate technology** in buildings, transportation, and the grid.	**We're building a cutting-edge offshore wind industry, marshaling world-class ports,** a robust supply chain and a highly trained workforce.	**We're partnering with schools and other education partners to build the skilled and diverse workforce** essential to achieving our climate goals.

MassCEC: What We Do

➤ **Award grants and make early-stage investments in a range of entities to advance climate and clean energy solutions in Massachusetts across a range of sectors including:**

- Building decarbonization
- Modernizing the grid
- Clean transportation solutions
- Early-stage start-ups in the clean energy and climatetech space
- Offshore wind innovation and investment
- Workforce development

➤ **Core business units support programmatic workflow, stakeholder engagement, and advance our work across all sectors, including:**

- Marketing and Communications
- Government Relations
- Business Development
- Data and Business Intelligence
- Finance

Priority Solution 1: CRM & Database

CURRENT STATE

➤ Fragmented and disparate data management approaches that result in significant data-siloing and inefficiencies

➤ Stakeholder contact information is managed across individual program team spreadsheets, emails and our grant-making system.

➤ Metric tracking is done manually through individual team spreadsheets and our grant-making system.

FUTURE STATE

➤ **A single source of truth**

➤ A scalable solution with out-of-the-box functionality, that can also include customizable fielding, automations and metrics tracking

➤ Automated workflows for individual users / teams

➤ Seamless integration with current applications

➤ Ability to synthesize program performance insights from reporting dashboards with drill down functionality*

➤ An on-going partnership with our solution provider

*We hope to eventually have this functionality in both the CRM and Grants Management Database (Priority Solution 2)

Priority Solution 2: Grants Management Solution

CURRENT STATE

- Our current grant-making system is not set up with strong portfolio/grant monitoring or grant milestone tracking and analysis

- The lack of scalability, UX customizability, automations and integration with key Microsoft applications has resulted in numerous inefficiencies.

- Reporting and analysis is done manually across teams, as the system does not have this functionality

FUTURE STATE

- **A single source of truth**

- Ability to synthesize portfolio and program performance insights from reporting dashboards with drill down functionality

- Automated task and workflow management

- A scalable solution with out-of-the-box functionality, that can also include customizable fielding, automations and metrics tracking

- Deep integration with the CRM

- Integrates with our financial accounting software and/or includes budget tracking

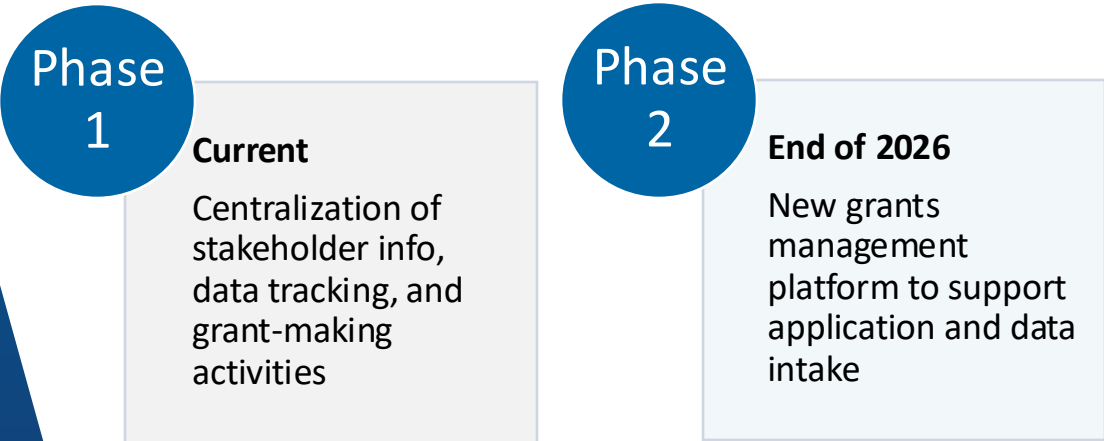# MassCEC CRM Solution, Implementation, and Support Services

RFP accessible on our website

https://bit.ly/4bUyUUq

SUBMISSIONS DUE APRIL 18, 2025

MULTI-YEAR COLLABORATION THROUGH A PHASED APPROACH:

Phase 1

Current
Centralization of stakeholder info, data tracking, and grant-making activities

Phase 2

End of 2026
New grants management platform to support application and data intake

Phase 1: CRM/Database

➤ **Phase 1a:** Implementation of a cross-organizational CRM platform/database

➤ **Phase 1b:** Integration of CRM/database with key systems

Users

➤ Internal MassCEC employees

Expected Outcomes:

➤ Implement a CRM-style approach to track progress and report key outcomes to MassCEC and stakeholders

➤ Store and track stakeholder, grantee information, and data to track key metrics

➤ Serve as a hub for disseminating information to grantees and external stakeholders in Government Affairs and across sectors (business, academia, etc.)

➤ Project management capabilities for grant and investment-making activities with drill down functionalities

Needed Capabilities: 2 Phases

Phase 2: Grants Management System (EST End of 2026)

➤ **Phase 2a:** Implementation of a new grants management system/application as a part of the core CRM platform/database

➤ **Phase 2b:** Enable grantee self service capabilities for application management

Users

➤ Internal MassCEC employees + Grantees

Expected Outcomes:

➤ Streamlined workflow for application management from application intake, to internal review and approvals processes

➤ Grantee self service, including application submissions and milestone data intake

➤ Project management capabilities for grant and investment-making activities with drill down functionalities

➤ The anticipated scope of work to support the development and implementation of a new CRM and Grants management is outlined in section **6. Scope of Work.**

➤ More detailed functional and technical requirements to be defined with the selected primary vendor

This RFP addresses:

Initial Analysis and Planning
- Strategic Planning
- Capability Mapping and Process Flows
- Technical Assessment
- Data Strategy
- Governance and Security

Business Process Mapping
- Training and Support
- Integrations with Key Systems
- Documentation and Resources
- Customization / Upgradeability
- Quality Assurance and Testing
- Governance and Compliance
- Artificial Intelligence

➤ The below is the additional scope of work we see as more specific to solely a CRM and solely a new Grants management system

This RFP addresses:

CRM General Requirements and Capabilities
- Contact and Account Management
- Sales and Pipeline Management
- Marketing/Communication Automation
- Grantee reporting
- Stakeholder and grantee reporting/analytics
- User Groups
- Operational Metrics

Grants Management General capabilities
- Grant Lifecycle Management
- Financial Management & Disbursement
- Compliance and Risk Management
- Grant terms and conditions management
- Communication and Collaboration
- Performance Monitoring and Impact Measurement
- Grantee reporting
- Stakeholder and grantee reporting/analytics
- Security and Access Control

A COMPLETED APPLICATION PACKET MUST CONTAIN THE FOLLOWING:

➤ **Cover Letter**, signed by an individual authorized to bind the proposed entity
➤ **Proposal** in MS Word or PDF format, **addressing all elements** outlined in **Section 7: How to Apply**
➤ **Vendor Response answers** provided in MS Word or PDF format outlined in **Section 7.1**
➤ **Attachment 1:** Authorized Applicants Signature and Acceptance Form **(pg. 30)**
➤ **Attachment 2: Agreement for services (pgs. 31 – 41 contain a sample agreement)**

<u>**Please note:**</u>

➤ Candidates <u>**MUST**</u> respond to every question AND explicitly respond to the implementation and cost for both Phase 1 and Phase 2 using the templates provided

➤ Only addressing selected parts of the RFP will disqualify vendor from the selection process

➤ Candidates should be prepared to demonstrate an outcome from a similar engagement (product demo)

➤ Other voluntary shared information such as marketing brochures included as part of the main body of the bid response shall not be considered. Such material must be submitted only as attachments and must not be used as a substitute for written responses.

Who is eligible to apply?

Massachusetts Presence: While there are no specific Massachusetts presence requirements, it is beneficial for applicants to show their ability to work within the state.

Collaboration: There is no prohibition against collaborating with other organizations. One party should take on the role of leading the application ("Primary Vendor").

General qualifications

- Address all information in RFP completely

- No proposals will be accepted past the deadline

- Proposals should be signed by an individual authorized to bind the primary vendor to contracts.

- Primary vendors should provide detailed information about their company, including a brief history, organizational structure, and the number of years in business

- Financial information will be held in strict confidence

- Primary vendors should provide references from two to four customers with similar objectives/requirements as MassCEC

- Vendors must describe their ability to meet MassCEC's application objectives, project timelines, and security requirements

Timeline

March 10, 2025	RFP period opens
March 24, 2025	Informational webinar
March 25, 2025	Deadline to submit questions
April 7, 2025	MassCEC to post responses to questions
April 18, 2025 by 11:59 PM	Proposal deadline
May 1, 2025	Interviews with top candidates begin
May 15, 2025	Interviews of top applicants finalized
June 2, 2025	Notification of award
Anticipated completion of Phase 1	December 2025

*This Timeline is subject to change at MassCEC's discretion

Decision Inputs

Preliminary Examination	Overall Costs	Detailed Technical Evaluation	Customer-led Product Demos	References	Notification of Award
MassCEC will examine the proposals to determine whether they are complete, signed, and generally in order.	Total cost of services Balancing upfront implementation and design vs. Long term licensing, support, and maintenance costs, with an eye to replacing existing systems.	Technical merits and features will be reviewed against the requirements identified in Section 5 –Proposal Solution and Description and Section 7 – Scope of Work.	While sales demos will suffice, candidates who are able to bring technical leads to the meeting to answer deeper questions about how the demos presented could be adjusted to meet the more specific needs articulated in this RFP will likely be able to demonstrate more components of the scoring criteria.	The primary vendor should provide details of 2-4 customers for reference, including specific products in use, "go live" date, and services provided. Include contact information for the client's project manager or senior staff. *MassCEC reserves the right to contact these references to discuss satisfaction with the vendor and its products.	A contract will be awarded to a single proposal based on the evaluation of the RFP responses and the satisfactory outcome of financial negotiations. After the contract has been awarded, MassCEC will notify the unsuccessful vendors.

Application process key takeaways

Review the RFP and attachments to understand the opportunity, requirements, and MassCEC's objectives.

Attend MassCEC informational webinar, review webinar questions when posted, and/or utilize other informational resources offered.

Contact MassCEC with questions and/or discuss your idea(s) via email at **businessanalytics@masscec.com.**

SUBMISSION: Submit proposal and attachments, adhering to format requirements, and other instructions listed within the RFP and each attachment, by email to businessanalytics@masscec.com by 11:59pm on April 18, 2025, with "Customer Relationship Management System and Services for MassCEC Application" in the subject line.

Q&A

RECAP

○ Submissions due on **April 18, 2025** by 11:59 PM EST.

○ All questions can be sent to [businessanalytics@masscec.com.](mailto:businessanalytics@masscec.com)

○ Questions with answers will be posted to the MassCEC

website, with the recording of this webinar by April 7th.

Access our webpage:

https://bit.ly/4bUyUUq