Request for Quotation Response

West Virginia Development Office Web-Based Database

RFQ Number: DEV1142

Vendor Name: Intellipoint Technologies, LLC

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Signature

MAY 5, 2011

Date

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Attachment A: Vendor Response Sheet

Vendor Experience

1. Provide information regarding the firm and staff qualifications; copies of any staff certifications or degrees applicable to this project; proposed staffing plan.

   Vendor Response

   We have been implementing Microsoft Dynamics CRM since the initial 1.0 version. We have professionals that have a wide range of experience implementing CRM. This includes teaching application functionality, configuring software, performing data conversions, and writing software customizations. We have attached CRM certifications for the CRM consultants for this project.

2. Provide resumes for personnel who will be assigned to this project. A listing of what roles shall be filled by each employee, is required.

   Vendor Response

   Key Roles:

   Sales Account Manager: Dennis Barry

   Project Manager: Nasha Hamra

   Project CRM Consultant Lead: Kevin Evans

   Project CRM Consultant: Chris Isbell

   Project Software Developer: Josh Vega

   Project CRM Consultant and Software Developer: Dan Vanderpool

   Dennis Barry is President of IntelliPoint Technologies, and has worked with Microsoft Dynamics CRM for 4 years. Dennis has undergraduate degrees in Computer Information Systems, Accounting, and Public Policy. He performed his graduate studies at Marshall University studying Political Science with a Statistical Analysis concentration. He has more than 25 years of experience in the IT industry and has worked closely with West Virginia state agencies for more than 12 years. He has guided IntelliPoint Technologies since 1998, a West Virginia based company, which is a Microsoft Dynamics Certified

Partner, and has achieved West Virginia ITECH since 2006. Dennis will coordinate the sales and review efforts for the project.

Nasha Hamra is an Applications Specialist and a Microsoft Certified Technology Specialist Managing Microsoft Dynamics Implementations with the Sure Step Methodology. Nasha's work history with computer technology spans 30 years with her primary focus being in the areas of application software, project management and quality assurance. She is an employee of IntelliPoint Technologies and will be the Project Manager for the Microsoft Dynamics CRM project coordinating and managing all areas of the project.

Kevin Evans is a Director with Martin & Associates, and a Microsoft Dynamics CRM Certified Professional. Kevin has a Bachelor of Science in Systems Analysis from Miami University, Ohio. He has 17 years experience in the IT industry and has been working with Microsoft Dynamics CRM since version 1.0 was released in 2003. He brings vast knowledge of both the CRM software as well as knowledge about how different types of organizations make best use of the software. Kevin will be the lead resource for implementing Microsoft Dynamics CRM.

Chris Isbell is a Senior Associate with Martin & Associates, and a Microsoft Dynamics CRM Certified Professional. Chris has a Bachelor in Business Administration from the University of Notre Dame, and a Masters of Business Administration from the University of Cincinnati. He has 13 years of experience in the IT industry, and has worked with Microsoft Dynamics CRM since version 3. Chris has a combination of skills, both technical and business-oriented, that enable him to bridge the gap and help deliver solutions that meet requirements in both areas.

Josh Vega is an Associate with Martin & Associates. Josh has a Bachelor of Science in Computer Engineering from the University of Cincinnati, Ohio. He has 6 years of experience in the IT industry, and has worked on multiple Microsoft Dynamics CRM programming projects since version 1.2. His understanding of the .NET architecture and how it interacts with the CRM software allows for Martin & Associates to develop customizations to Microsoft Dynamics CRM.

Dan Vanderpool an Associate with Martin & Associates. Dan has a Masters of Science in Management Information Systems and a Bachelor of Science in Business Administration from Kennedy Western University. He also has an Associate Arts degree in Accounting Technology from the University of Kentucky, Ashland Branch. He has over 20 years of experience in the IT industry, and has performed software programming in many technologies including Microsoft .NET, and has worked on customizing Microsoft Dynamics CRM.

3. The vendor must have completed at least three (3) projects within the past three (3) years which are similar in scope to the project for which this RFP is soliciting proposals. The vendor must provide a brief description of this project, the timeframe for development, and the vendor's opinion of the success of the project.

   Vendor Response

   We have performed a number of Microsoft Dynamics CRM implementations. They have not been for state development offices, but we have done projects that required the same skills. This project would entail adding a lot of custom entities and fields, and we have done a lot of that during implementations.

4. Provide descriptions of similar projects completed which should entail the location of the project, project manager name and contact information, type of project, and what the project goals and objectives were and how they were met.

   Vendor Response

   Haversham & Baker

   Haversham & Baker arranges United Kingdom golf trips for their clients. They are a heavy user of Microsoft Dynamics CRM, and primarily use it in the area of business development. The project goal was to automate as many processes as possible, in order to not add employees to do manual work. This was accomplished by integrating CRM to Microsoft Dynamics GP, their accounting system, so that CRM information could be automatically pushed into their accounting software.

   The project manager is the contact name listed in #5 for references.

Aero Fulfillment

Aero provides outsourced warehouse fulfillment services and other business services to customers. We implemented Microsoft Dynamics CRM for sales and marketing purposes. They use it to maintain information about all prospects and customers.

Their project goal was to have one repository of information, so that all Aero employees can see and update the information about companies and contacts.

The project manager is the contact name listed in #5 for references.

Direct Options

Direct Options provides services to utility companies to help those companies' market energy efficiency programs to consumers. They are primarily using Microsoft Dynamics CRM for business development.

Their project goal was to keep track of all utility companies in the country, perform marketing campaigns to reach those organizations, and track the sales efforts. This was accomplished using out of the box features.

The project manager is the contact name listed in #5 for references.

5. Provide references from this project that is willing to discuss the vendor's performance in this specific area. The required reference information is as follows: contact name, phone number, mailing address, e-mail address, and contact's title.

Vendor Response

Haversham & Baker

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Director of Member (Client) Services

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Executive Assistant

Vendor Disclosures

1. Identify any and all subcontractors that will be involved in the development, implementation, training and ongoing support of this system. The primary vendor will be responsible for any and all work performed by subcontractors.

   Vendor Response

   Martin & Associates, Inc. is a subcontractor that will be involved in the project.

2.4.1. Purchasing and implementing of a software solution that replaces the Agency's current fifteen (15) databases with a single, integrated, web accessible, COTS-based system (Desired to be Microsoft CRM (Customer Relationship Management) Windows based.

Vendor Response

We would implement Microsoft Dynamics CRM to offer functionality to replace the 15 current database systems.

2.4.2. Providing an integrated business process, standardized data entry processes, data usage and implementation of standardized codes across all the WVDO business units/databases.

Vendor Response

Microsoft Dynamics CRM will provide a good foundation for many of the WVDO business units, to hold information about companies and contacts. We will then use the point-and-click tools to add new entities, fields and screens to capture all of the additional data fields described in the RFP. It will therefore handle grants, projects, etc.

Additionally, we can use a feature that can show a different screen layout for different users based on security, so that Community Development doesn't have to look at fields that only pertain to International Development, for instance.

We will need to write an actual software code customization to enhance the software to determine a "next number" for all of the entities that need that.

2.4.3. Provide for data conversion and migration of existing West Virginia Development (WVDO) information, including at a minimum, the conversion of the WVDO databases.

Vendor Response

We go through a process of determining and documenting the data conversion requirements, mapping of the data tables and fields, and then perform test data conversions prior to a live/final data conversion. We will do this for all of the WVDO databases described in the RFP. The timeframe for this will be determined at the beginning of the project, but in general the data conversion will be approximately 5 months duration time.

2.4.4. Provide the mechanism that help to ensure the collection and maintenance of synchronized data; improve data accuracy, increase efficiency and provide better reporting and tracking functionality to the WDO Executives; State Executives; Legislature and other entities in WVDO.

Vendor Response

Microsoft Dynamics CRM has out of the box functionality to allow for entering data offline, which can then be synchronized with the master database. The ability for Microsoft Dynamics CRM to provide real-time, web based reports, can allow executives to make better decisions.

2.4.5. Provide the methodology and lead the WEBCATS associated conversion, integration and/or interfacing efforts. (WVDO has converted the SB Assist system to WEBCATS)

Vendor Response

Until more information is provided about what WEBCATS functionality entails, and the desired integration points, the WEBCATS integration is not within the scope of our project estimate.

2.4.6. Provide the capability to track, maintain and report on the information for all the programs, funds, grants, projects, grantee's, domestic/international companies business development activities and opportunities.

Vendor Response

Microsoft Dynamics CRM can track information about companies, contacts, opportunities and many other out of the box and custom entities in order to fulfill this requirement.

2.4.7. Provide an Ad-hoc reporting environment

Vendor Response

There is an Advanced Find ad-hoc querying tool in the system, which allows for querying on all of the data. There is also a report wizard to quickly build ad-hoc reports.

2.4.8. Provide the ability to generate reports weekly, monthly, and annually for all reports including, but not limited to the documented reports.

Vendor Response

Custom reports can be created using Microsoft SQL Server Reporting Services, and can be scheduled to be generated.

2.4.9. Provide for a web based automated applications process with the ability to limit the access

Vendor Response

We cannot meet this requirement out of the box.

2.4.10. Provide ability to produce automated emails (including mass emails), letters, forms, cover letters, and award letters based on the information in the system.

Vendor Response

There are a number of ways to produced automated emails, including mass emails, using Workflow Rules, Campaigns and other features. Users can also generate emails, letters, forms, cover letters and aware letters using information from the system, via the CRM Word Mail Merge functionality.

2.4.11. Providing for an expanded functionality and scalability based on future needs and growth while addressing the current technology needs.

Vendor Response

Custom entities (tables, windows) and fields can be added to CRM at any time, allowing for a great degree of change in the future.

2.4.12. Enterprise Resource Planning System (ERP)

The State of WV is in the process of implementing an Enterprise Resource Planning (ERP) system. Demonstrate the ability to integrate and/or interface with complex modular systems, such as those commonly found in Enterprise Resources Planning Systems (ERP).

Vendor Response

We have integrated Microsoft Dynamics CRM to ERP systems numerous times.

2.4.13. Providing Security and Controls for the proposed solution.

2.4.13.1 Provide for confidentially of customer data.

Vendor Response

The web-site access can be encrypted with Secure Sockets Layer (SSL) to ensure that data communication and authentication are secure. In addition, SQL Server security is used to prevent unauthorized access.

2.4.13.2 Ensure compliance with the established State enterprise security processes, including overall system access, violation reports, audit trails (Grants Awarded, amounts paid, balances), and system logs.

Vendor Response

System access is controlled on user security, which also relies upon SQL Server security. Violation reports and changes to data could be viewed via the audit trails functionality.

2.4.13.3 Provide for and maintain an "audit trail" that tracks user access regardless of any changes made to the information housed within the system. For compliance purposes, the audit train should be keyed to the user ID. The audit train should detail the date and time of access, change, the user making the change, the office where change occurred, the nature and impact of the change that has been made.

Vendor Response

Microsoft Dynamics CRM provides audit trail capabilities to track the user making a change, date/time, data that changed.

2.4.13.4 Providing control and limit access via logins and/or other security mechanisms. Access control and integrated security in general, should be managed by role rather than by authorizing a specific individual. The principle of least privilege should be in effect. Critical functions should be divided among different roles so that no one individual has all of the necessary authority of information that could result in fraudulent activity. The solutions should provide the capability for the system administrator to generate a status report detailing the values of all configurable security parameters. Throughout the system, the system administrator should be able to provide access and restrictions based on individual roles. At a minimum, the solution should provide the following controls:

- Transaction access
- Process access
- Transaction approval process
- Workstation location access
- Workstation time restriction
- Restriction of user access to operating system, system files and utilities
- Restrictions of user access to security files and resources
- Prevention of users from elevating their privileges or managing their own access to resources
- Restriction of access by job function
- Restriction of access by organizational unit

Vendor Response

Microsoft Dynamics CRM can control security by user role. It can accommodate the following controls out of the box:

Transaction access

Process access

Transaction approval process

Restriction of user access to security files and resources

Prevention of users from elevating their privileges or managing their own access to resources

Restriction of access by job function

Restriction of access by organizational user

It cannot accommodate the following controls:

Workstation location access

Workstation time restriction

2.4.13.5 Provide the access/authentication specifications. The authentication should comply with all current and future security policies and procedures of WV Office of

Technology which can be found at http://www.technology.wv.gov/about-wvot/pages/polices-issued-by-the-cto.aspx

Vendor Response

For CRM On-Premise, it uses Microsoft Active Directory for authentication. For CRM Online (Hosted), it uses Microsoft Live ID.

2.4.13.6 Providing the types of access that may be granted, at a minimum, create, read, update, execute, and/or delete access should be available, but WVDO should also be able to restrict user access to the minimum necessary to perform job duties.

Vendor Response

A number of types of access levels can be granted for each type of entity in CRM, including Create, Read, Write, Delete, Append (Notes), Assign. There is also the ability to restrict access down to the field level.

2.4.13.7 Provide a function where one or more individuals (Administrative) would have full access to enter, edit and post data.

Vendor Response

Microsoft Dynamics CRM uses role based security, and one or more administrative individuals can have full access to everything.

2.4.13.8 Providing a solution where the vendor should populate security repositories and associate them and their roles into the system using an appropriate security administration tool, and the vendor should provide written affirmation certifying that it has done so prior to any User Testing or production activities. The vendor should work closely with WBDO staff to define the roles necessary to perform all required business functions.

Vendor Response

We can train WVDO staff on how to set-up and maintain security, or the security requirements can be communicated to us, we can set-up security and provide written affirmation of what was done.

2.4.13.9 Provide support of LDAP or SSO authentication. The vendor should provide a description of the method(s) of authentication provided and how that authentication appears to the user.

Vendor Response

For CRM On-Premise, it uses Microsoft Active Directory for authentication. So if the user is logged into Windows as themselves, it can automatically authenticate the user for Single Sign-On, so the user doesn't have to enter a user ID/password.

For CRM Online (Hosted), it uses Microsoft Live ID. The first time the user accesses CRM Online, they enter a Live ID and password. Windows and Internet Explorer can remember that login for Single Sign-On if desired.

2.4.13.10 Providing an advisory warning message on the login screen regarding authorization and unauthorized use of WVDO's business information and the possible consequences of such violations.

Vendor Response

There is not a built-in advisory warning message, however a small JavaScript customization would be written to pop up an advisory warning message.

2.4.13.11 Providing a display of the user name, the date and time either of the last successful login or the number if unsuccessful attempts to access the system since the last successful system access upon authorization of the login user name and password.

- The solution should not allow simultaneous logins with the same user credentials.
- The West Virginia Office of Technology reference for Active Directory password requirements and criteria that can be found http://www.technology.wv.gov/support/pages.passwordcriteria.aspx
- In general, the system should not allow simultaneous logins with the same user name and password. Should a user try to log in more than once, the system shall ask him/her if he/she wishes to terminate the active session and establish a new session. If the response is no, the login should not be allowed. However, WVDO notes that in the current environment, IT support personnel, called to a user's desktop to diagnose a problem, are permitted to log in on that desktop with their own user id even while maintaining the session they may already have open (but locked) on their own desktop. The vendor is required to describe how

WVDO can continue to provide this level of support while adhering to the single login policy stated above.

- The user should either logoff the system or be automatically logged out of the system after a user administrator defined period of idle time (the maximum idle time value should be a parameter modifiable by the system administrator). The system should provide a notification one minute prior to a time out. Whether the user logs off or the system logs the user off after idle time threshold has been exceeded, the system should then ensure that all objects created for the user at the back-end are destroyed and the system exits cleanly.
- After multiple unsuccessful login attempts, the system should:
    - Disable the user account for a period of time previously defined by the security administrator.
    - Record the event for audit
    - Inform the user of a contact who will unlock the account – or provide another mean of authenticating the user password.
- Passwords should be a minimum of eight characters in length, including both letters and numbers, and not be case sensitive. Passwords should not be displayed in the application at any time. The system should have the ability for passwords to automatically expire after a specified period of time and should prompt the users to change their password several days before they are due to expire. When changing a password, they user should enter the old password once and the new password twice. If the password change fails, the user should be informed that the request to change the password has failed and they reason for the failure, in plain English. Then the user should be advised to try again by logging out and logging back in. Passwords should be stored in an encrypted manner so that they cannot be obtained by WVDO systems maintenance personnel or any unauthorized intruder who gains access to the system.
- If the user forgets his password, they system should supply a password Q&A to assist in remembering – and if that fails as well, they system administrator should be able to reset the password to a temporary value. The system should disable any account with temporary password that is more than 8 days old.

Vendor Response

CRM does not have the ability to prevent a simultaneous login with the same user ID and password.

For CRM On-Premise:

The CRM system does not automatically logoff, but a domain policy can be specified to automatically logoff or lock the Windows session, which effectively fulfills this need.

After multiple unsuccessful login attempts, the system does not disable the user account but it does log the security event for audit. The system does not inform the user who specifically will unlock the account.

You have complete control over the password policy as is controlled by Active Directory, including password complexity and expiration.

If the user forgets their password, there is not a password Q&A to assist in remembering the password. The user would need to have their Active Directory password reset.

For CRM Online:

The Live ID used by CRM will automatically logoff, but that length of time is not configurable.

After multiple unsuccessful login attempts, the system does not disable the user account nor record the event for audit. But after 10 login tries, it then forces the user to not only enter the correct password, but to also enter a CAPTCHA challenge and response (the user sees a distorted image and has to enter the characters and numbers they see). The system does not inform the user who specifically will unlock the account.

In terms of password policy, it uses Windows Live ID Password requirements – currently a 6 character minimum, case-sensitive password. You cannot change the level of password complexity.

If the user forgets their password, Microsoft Live ID has a web-site to handle the password reset process.

2.4.13.12 Provide tools for the system administrator to manage user accounts. This should include such tasks as resetting a password and activating, suspending, or deleting a user account. These functions should be limited to only the system administrator or other well-defined privileged users.

Vendor Response

A system administrator user with the appropriate permissions can manage user accounts, including enabling or disabling a user account. For CRM On-Premise, the password can be reset using Active Directory. For CRM Online, the user would use a web-site to initiate a password reset.

2.4.13.13 Provide the capability to suspend or activate a user account. This may occur for the following reasons:

- Account is locked out after password is entered incorrectly more than three times.
- If the user temporarily us not entitled to access.
- The account is suspended by the systems administrator, for example if a security breach is suspected.
- The account has been inactive for an extended period of time.

Vendor Response

You can disable and enable a user account, but there is not a feature to automatically lockout the user after X amount of failed login attempts.

2.4.13.14 Provide the capability to ensure that relevant information about actions performed by users can be linked to the user in question in sufficient detail so that the user can be held accountable. They system should maintain information sufficient for after-the-fact investigation of loss or impropriety and should provide individual user accountability for all security-relevant events. They system should protect this information from unauthorized access or modification.

Vendor Response

There is a complete audit trails capability that will show what a user did, including data that was changed or deleted.

2.4.13.15 Provide tools for the system administrator to monitor the activities of specific terminals or network addresses in real time. They system level log should allow review of key security events, including:

- Logon and logoff of users, including failed logins
- Change or reset of passwords
- Creation or deletion of users
- Amendment of user rights

- Suspension or activation of user accounts
- Archiving procedures

Vendor Response

For CRM On-Premise, these security events can be logged.

For CRM Online, there is currently not a way to have a system level log to review those security events.

2.4.13.16 Provide the system administrator with the capability to independently and selectively review the actions of any one or more users, including privileged users, based on individual user identity.

Vendor Response

The audit trails capability allows you to report on the activity of just one user if desired.

2.4.13.17 Provide a real-time capability to monitor and log the occurrence or accumulation of security- relevant events that may indicate an imminent security violation and immediately notify the system administrator when events exceed established thresholds. If the occurrence or accumulation of these security relevant events continues, the system should take the least disruptive action necessary to terminate the event involved.

Vendor Response

For CRM Online, there is not currently a way to do this.

For CRM On-Premise, this could be accomplished using the out of the box Windows event logging.

2.4.13.18 Provide an interface for the Security Administrator to manage user accounts. The interface should include such tasks as resetting a password and activating, suspending or deleting a user account. These functions should be limited to only the Security Administrator and other well-defined privileged users.

Vendor Response

See 2.4.13.12

2.4.13.19 Provide a reporting mechanism that allows security administrator(s) the ability to report the current security access for any individual or group of individuals by role for an on-going (annual) security review or on demand. One should be able to select an individual or a group of individuals, by name, role, organizational unit, or privilege to generate such a report.

Vendor Response

You can run reports to see the current security access for any individual or group of individuals by selecting the individual, security role, business unit, or security privilege.

2.4.13.20 Provide methods to encrypt, redact or otherwise secure such information with respect to its level of confidentiality/importance and not only prevent unauthorized access but alert authorities of access attempts, as the proposed system is to be browser-based for both internal and external users, the vendor should discuss its solution's approach to safeguarding personal and private information from fraudulent efforts to gain access to such information. That discussion should consider WVDO categorization of date in the following level:

- Public – Public information that may be made freely available, unrestricted, and has been approved for release to the public. However protecting the integrity of the information on the web site is important (e.g., protection against hackers who seek to deface the web page or change data). Examples of public data include information in the public domain, published annual reports, and press statements.
- Internal use only – Information that is accessible to and used by WVDO personnel only, without restriction, in the performance of their job duties. Examples include internal memos, minutes of meeting, internal project reports, non-audit work papers, audit plan, procedures.
- Confidential – Confidential data that is sensitive information such as: human resource data, audit findings and conclusions that is not ready for distribution as well as internal audit working documents, accounting, and sensitive customer information.
    - Private in nature, e.g., Social Security number, driver license or non-driver ID, account number, credit or debit card number with security code (PIN) or account password.
    - Personal in nature, e.g., payroll information (individual), retirement system information (beneficiaries), Medical data, healthcare information, client reports

- Restricted Confidential – This is highly sensitive internal information such as: Investment strategy; legislative proposal; investigations; information protection review and penetration test findings; certain audit findings and conclusions that are not read for any distribution; certain personnel/labor management actions. Access to this information is highly restricted and distribution is controlled to a very select few.

Vendor Response

With CRM online, access is via web client and possibly the offline outlook client. MS handles all the web server settings and access logs. All data is accessed securely (SSL). Security rights within CRM can limit who can see what data, as well as Business Units and Teams.

On-premise with an internet facing deployment must be SSL-encrypted, and WVDO must maintain the security and logs for that externally accessible website. The CRM claims-based authentication would control who could access the site externally, and then the same security roles, business units and teams control data access.

2.4.14. Provide hosting services for the proposed solution.

2.4.14.1 All the specifications of this RFP should be met by this solution in addition to the following.

2.4.14.1.1 Ensure it meets the following Service Descriptions

- The solution should provide hosting services enabling scalable, redundant, dynamic web hosting services.
- Web hosting should allow users to securely load applications and data onto the provider's service remotely from the Internet.
- Configuration of Web Hosting should be enabled via a Web Browser over the Internet.

Vendor Response

Microsoft Dynamics CRM Online can be hosted by Microsoft as well as third party hosting providers.

2.4.14.1.2 Ensure it meets the following Service Options:

CPU (Central Processor Unit) – CPU options should be provided as follows:

- A minimum equivalent CPU processor speed of 1.1GHz should be provided. Additional options for CPU Processor Speed may be provided, however it is not required.
- The CPU environment should support 32-bit and 64-bit operations

Operating System (OS) – Service should support Windows and LINUX OS's at a minimum. Additional OS options may be provide or supported; however, this is not a required.

Website software's: Service should support the following

- Database instance
- Web Server software (e.g. Apache, IIS)
- DNS (Domain Name System)
- DNS Sec (Domain Name System Security Extensions)

Vendor Response

The system supports both 32-bit and 64-bit Operating Systems. The minimum processor for 32-bit is 750-MHz CPU, and the minimum processor for 64-bit is 1.5 GHz CPU.

Microsoft Dynamics CRM only supports Windows environments, not Linux.

2.4.14.1.3 Ensure it meets the following Service Attributes:

Disk Space – Disk Space allocated should be a minimum of 10GB

Data Transfer Bandwidth

- Bandwidth utilized to transfer data in/out of the provider's infrastructure should support a minimum of 300GB for data transferred via the Internet.
- The Vendor should support Content Delivery Network (CDN) capabilities.

Vendor Response

A minimum of 10GB disk space can be allocated.

CRM does not currently support Content Delivery Network capabilities.

2.4.14.2 Ensure the solution has the most aggressive intrusion-detection and firewall protection.

Vendor Response (Describe in detail how the solution will meet this goal and provide in detail (1) Server and network specifications. (2) Describe, in detail, the workstation specifications, compatible printing devices or any additional software required to support this system. (3) Describe, in detail the server specifications required to host this system (4) Provide the recommended hardware requirements for the solution.)

Server and network specifications:

For CRM On-Premise, if it is on WVDO's servers, intrusion-detection and firewall protection are the responsibility of WVDO. If it is on servers located at an outsourced data center, intrusion-detection and firewall protection can be part of the hosting package.

Microsoft Dynamics CRM Server 2011 Hardware Requirements:

The following table lists the minimum and recommended hardware requirements for Microsoft Dynamics CRM Server 2011 running in a Full Server configuration. These requirements assume that additional components such as Microsoft SQL Server, Microsoft SQL Server Reporting Services, Microsoft SharePoint, or Microsoft Exchange Server are not installed or running on the system.

Component	***Minimum**	***Recommended**
Processor	x64 architecture or compatible dual-core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	2-GB RAM	8-GB RAM or more
Hard disk	10 GB of available hard disk space **Note** Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.	40 GB or more of available hard disk space **Note** Computers with more than 16GB of RAM will require more disk space for paging, hibernation, and dump files.

* Actual requirements and product functionality may vary based on your system configuration and operating system.

For CRM Online, the server is taken care of by the hosting provider.

The recommended minimum available bandwidth of the network connection is 300 Kbps.

Workstation Requirements:

For Web Access: Internet Explorer 7 or 8 or a later version

For Microsoft Dynamics CRM for Outlook:

Software requirements:

Any one of the following operating systems is required:

- Windows 7 (both 64-bit and 32-bit versions)
- Windows Vista (both 64-bit and 32-bit versions)
- Microsoft Windows XP Professional SP3
- Microsoft Windows XP Tablet SP3
- Windows XP Professional x64 Edition

Hardware requirements:

The following table lists the minimum and recommended hardware requirements for Microsoft Dynamics CRM for Microsoft Office Outlook.

Component	*Minimum	*Recommended
Processor (32-bit)	750-MHz CPU, or comparable	Multi-core 1.8-GHz CPU or higher
Processor (64-bit)	x64 architecture or compatible 1.5 GHz processor	Multi-core x64 architecture 2GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	2-GB RAM	4-GB RAM or more
Hard disk	1.5 GB of available hard disk space	2 GB of available hard disk space
Display	Super VGA with a resolution of 1024 x 768	Super VGA with a resolution higher than 1024 x 768

* Actual requirements and product functionality may vary based on your system configuration and operating system.

2.4.15. Provide training for up to hundred (100) WVDO employees.

2.4.15.1 Provide a train-the-trainer program and training materials provided in electronic format. Provide system training during installation as performed at each site.

Vendor Response

Training will be provided for up to 100 WVDO employees. Training can be provided as a train-the-trainer program, and training materials will be provided in electronic format.

2.4.15.2 Provide hands-on Administrator Level Training to users with a detailed understanding of how to utilize the system.

Vendor Response

We will provide hands-on Administrator Level training to the appropriate users.

2.4.15.3 Provide technical training for maintenance of the solution and interfaces; clearly delineating the methodology and timeframe of this type of training, as well as the types of training forums available.

Vendor Response (Provide in detail, the type and variety of their standard user training offerings, this detailed explanation should include the different types of training, as available to the WVDO including, but not limited to: on-site user training(including descriptions of standard class size and length of such proposed training), a Train the Trainer option, and On-line training if available.)

Technical training can performed on-site or live on-line. For CRM Online, certain maintenance tasks do not have to be performed by WVDO, such as maintaining SQL Server. Therefore the training would be more on the remaining elements, such as data clean-up. Typical class size is 10 people.

2.4.16. Provide system documentation that provides in depth detail for each function/component of the solution.

2.4.16.1 Documentation provided to the State should cover several areas of usage of the proposed system. These should include, but should not be limited to User Manuals, System Design Documents, Database Diagrams, Program Documentation, and Status Reports.

Vendor Response (Describe/Provide the types of document that will be provided and what they will contain)

Microsoft provides software user guide documentation on all aspects of the software. There are also manuals for more technical components, such as creating Workflow rules and creating customizations.

Additionally, there are Microsoft created database diagrams and metadata information.

2.4.16.2 Provide WVDO with permission to reproduce this documentation which is written and electronic format as necessary.

Vendor Response (Do you agree to provide WVDO with the permission to reproduce this documentation)

Yes, WVDO will have permission to reproduce the documentation.

2.4.16.3 Update system documentation accordingly in the event that system changes are made.

Vendor Response

Microsoft updates the software documentation as new versions are released.

2.4.17. Providing Project Management and Implementation Schedule for the proposed solution.

2.4.17.1 Provide an implementation schedule for the assessment, business process consolidation, data conversion and migration of the WVDO's data, the development of required modifications to their solution, the development of any necessary interfaces, and the technical and end-user training. This Project Management Methodology should be provided in a detailed, descriptive fashion, offering, at a minimum, the following information:

Vendor Response

Microsoft Dynamics Sure Step Methodology

Our approach to this opportunity will be structured according to our implementation methodology known as Microsoft Dynamics Sure Step which has five implementation phases (Analysis, Design, Development, Deployment, and Operation).

We will leverage the Sure Step Methodology to execute this project. Sure Step provides a structured approach to implementing Microsoft Dynamics CRM. The Sure Step Methodology provides detailed guidance on roles required to perform activities and proven best practices. Flowchart diagrams within this implementation methodology point to tools and templates that can be used at different phases of an implementation project.

Sure Step Methodology organizes the approach into five distinct phases during the implementation project lifecycle (see Figure 1):

- Analysis
- Design
- Development
- Deployment
- Operation

Figure 1 – Sure Step phases

The implementation will begin with analysis to determine the order in which we will implement the solution. Once the order of deployment is determined and the Analysis phase is complete, we will design and configure the solution which will be deployed in your company. Once we have completed the Sure Step phases of Analysis through Development, we will proceed with the Deployment and Operation phases to implement the solution at the location(s) determined during the planning activities in the Analysis phase.

Proposed Approach and Implementation Methodology

Approach

By utilizing the Microsoft Sure Step methodology the State of West Virginia can be assured of a well designed, structured approach. We will provide a test environment as well as a training environment, whereby client personnel will be working with their 'own' data during the design through deployment stages.

Analysis

The Analysis phase represents the official start of the implementation. This phase defines the activities required to initiate and effectively plan the entire project. The Analysis phase is initiated with the executive kick off meeting designed to provide executives with an overview of the project vision, scope, objectives, key performance indicators (KPI's) and benefits. In addition, the meeting covers the schedule, milestone, resources, roles and responsibilities and deliverables. Kick off meetings with similar agendas are also conducted with the internal project team and with the customer project team members.

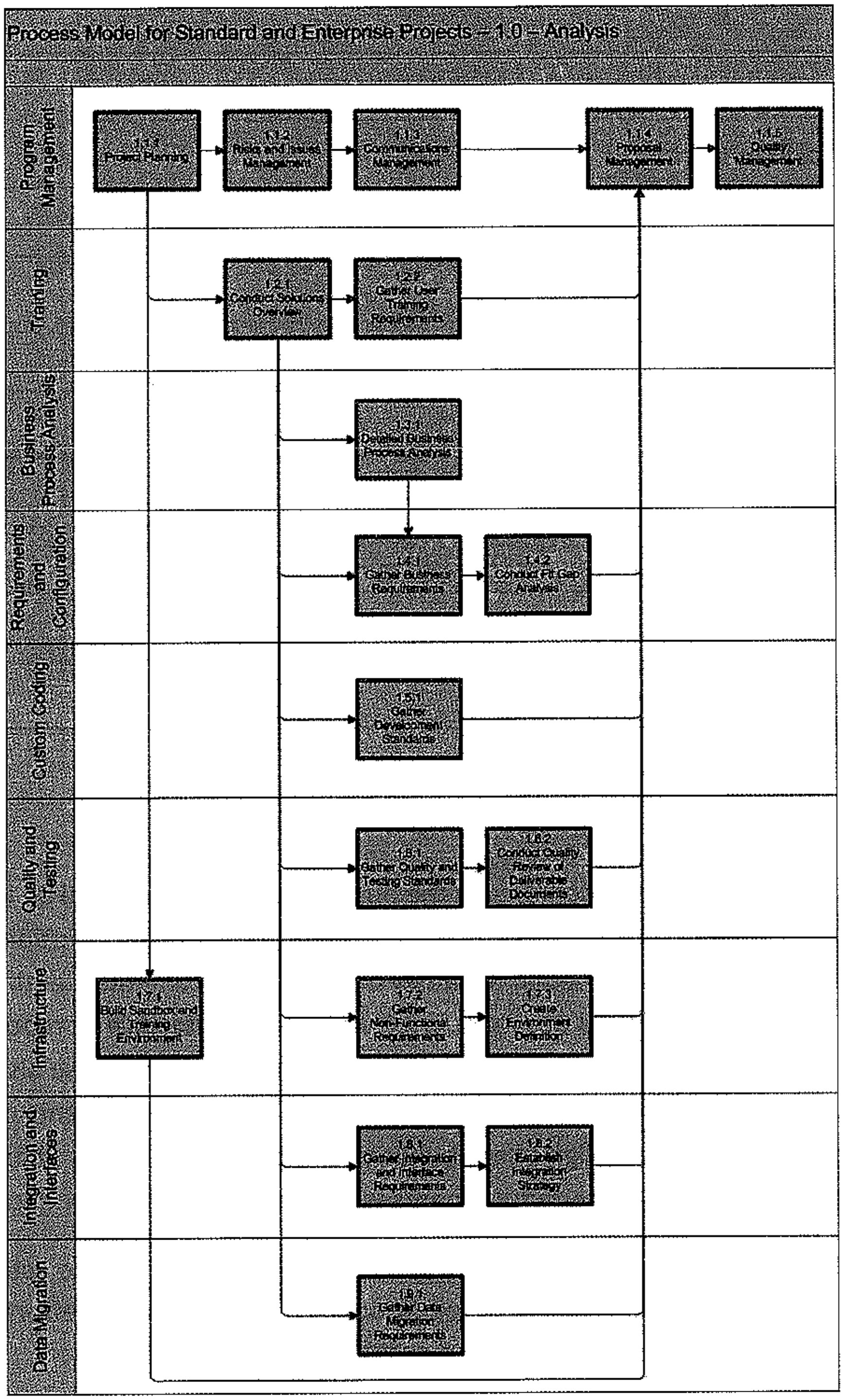
Following the project kickoff, the project planning team begins the finalization of the project charter and the project plan. This is approved by the customer and forms the basis of the entire project.

The functional consultants conduct business process workshops to document and model the future state business processes. During the Analysis phase, gathering and documenting the customer's business requirements is the most important set of activities that must be undertaken when implementing Microsoft Dynamics CRM. These requirements are documented in the Functional Requirements Document (FRD) which is an input to the Fit Gap Workshop. The Fit Gap Workshop produces the Fit Gap Spreadsheet which is used to determine the business requirements that are a "Fit" for either the Microsoft Dynamics CRM or the ones that are "Gaps" that will need customization.

The training team conducts the solution overview, captures the training requirements and creates the core team training plan, while the consulting team captures the development standards, quality and testing standards, interface and integration requirements and the data migration requirements. The technology team captures the non functional requirements, and assesses the infrastructure and provides recommendations on the environments to be setup and the configuration of these environments.

After the requirements are documented, they are analyzed and reviewed with the customer to obtain final approval. This forms the basis of the scope for the implementation.

A tollgate review is conducted at the end of the phase to ensure that milestones and deliverables are provided per the quality standards and that any risks and issues are proactively addressed going into the next phase. Figure 2 illustrates the key activities for each cross-phase during Analysis.



Key Deliverables from the Analysis Phase

Deliverable / Work Product
Project Charter
Project Plan
Risk and Issues Register
Change Control Plan
Communications Plan
User Training Requirements
Future State Business Process Workflows
Fit Gap Analysis
Quality and Testing Standards
Infrastructure Scope Document
Integration and Interface Requirements
Data Migration Requirements

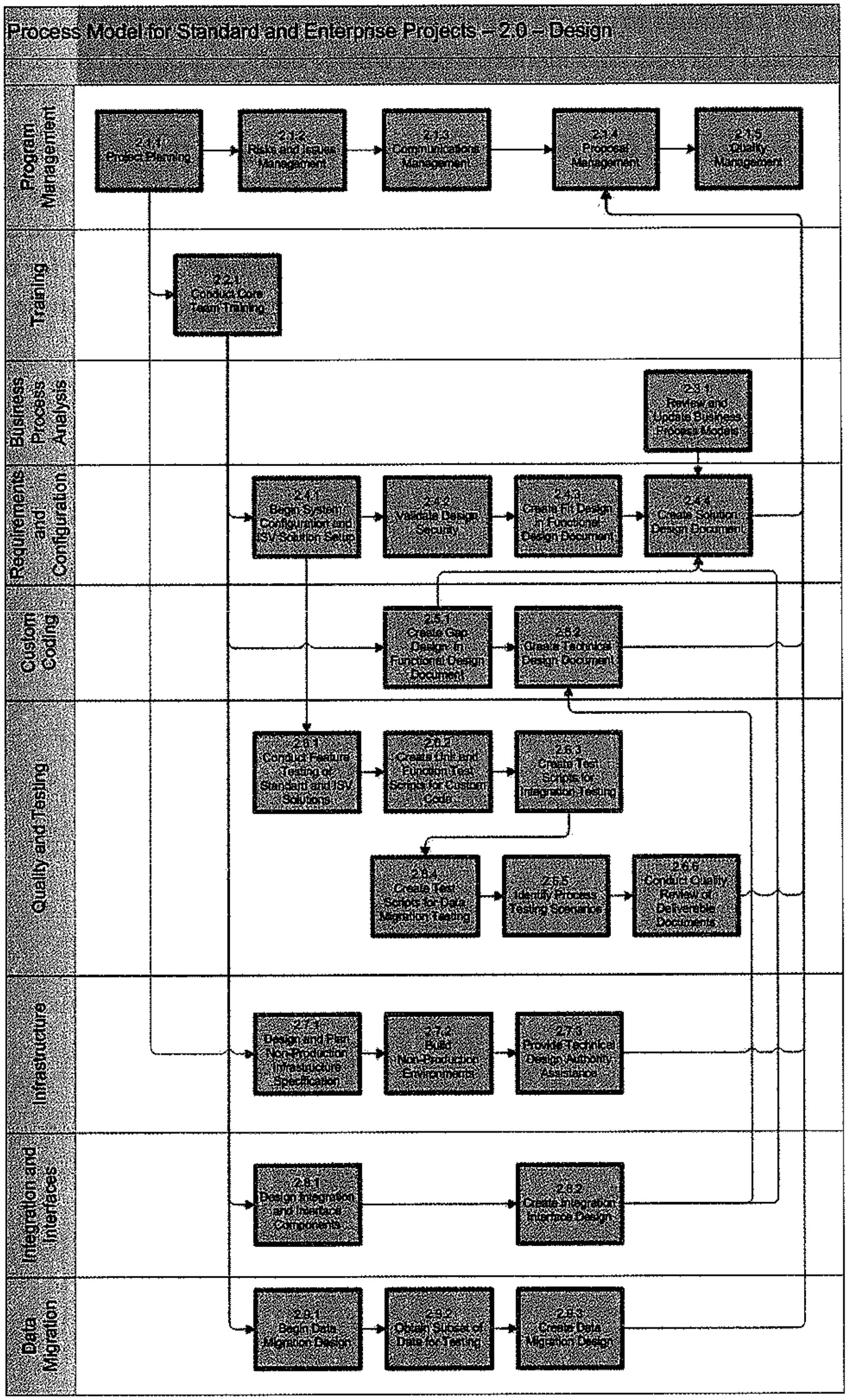
Design

The goal of the Design phase is to define how the business requirements will be implemented. The phase includes configuration of the overall Microsoft Dynamics CRM solution and the design of specific customizations needed to satisfy business requirements identified during the Analysis phase. The customizations can range from simple user interface or report modifications to complex functionality additions or modifications. This phase also includes activities to design the integrations and interfaces and data migration elements required to support the requirements. The Design phase builds on the previous Analysis phase by acting on the deliverables that result from the requirements workshops conducted for each cross phase.

In the Design phase, non-production environments such as DEV and TEST are established to support the system configurations and in preparation for the development effort required for integration and interfaces, data migration, and custom code development.

Risk management continues to play an important role in the management of the project. Risks should be confirmed and new risks identified on a weekly basis to properly create mitigation plans. The project schedule is updated accordingly.

The Design phase culminates with the completion of the Functional Design Document and Technical Design Documents. The project scope is finalized, with all requirements considered in scope cross-referenced to one of these documents. Customer sign-off is obtained on all the design elements and the final estimates, and the development team is readied for the custom code development effort. Figure 3 illustrates the key activities for each cross-phase during Design.



Process Model for Standard and Enterprise Projects – 2.0 – Design
Program Management
Training
Business Process Analysis
Requirements and Configuration
Custom Coding
Quality and Testing
Infrastructure
Integration and Interfaces
Data Migration
2.1.1 Project Planning
2.1.2 Risks and Issues Management
2.1.3 Communications Management
2.1.4 Proposal Management
2.1.5 Quality Management
2.2.1 Conduct Core Team Training
2.3.1 Review and Update Business Process Models
2.4.1 Begin System Configuration and ISV Solution Setup
2.4.2 Validate Design Security
2.4.3 Create Fit Design in Functional Design Document
2.4.4 Create Solution Design Document
2.5.1 Create Gap Design in Functional Design Document
2.5.2 Create Technical Design Document
2.6.1 Conduct Feature Testing of Standard and ISV Solutions
2.6.2 Create Unit and Function Test Scripts for Custom Code
2.6.3 Create Test Scripts for Integration Testing
2.6.4 Create Test Scripts for Data Migration Testing
2.6.5 Identify Process Testing Scenarios
2.6.6 Conduct Quality Review of Deliverable Documents
2.7.1 Design and Plan Non-Production Infrastructure Specification
2.7.2 Build Non-Production Environments
2.7.3 Provide Technical Design Authority Assistance
2.8.1 Design Integration and Interface Components
2.8.2 Create Integration Interface Design
2.9.1 Begin Data Migration Design
2.9.2 Obtain Subset of Data for Testing
2.9.3 Create Data Migration Design

Key Deliverables from the Design Phase

Deliverable / Work Product
Functional Design Document (FDD)
Technical Design Document (TDD)
Process Test Scenarios
Non-Production Environment Specification
Integration and Interface Design in Solution Design Document (SDD)
Data Migration Design in Solution Design Document (SDD)

Development

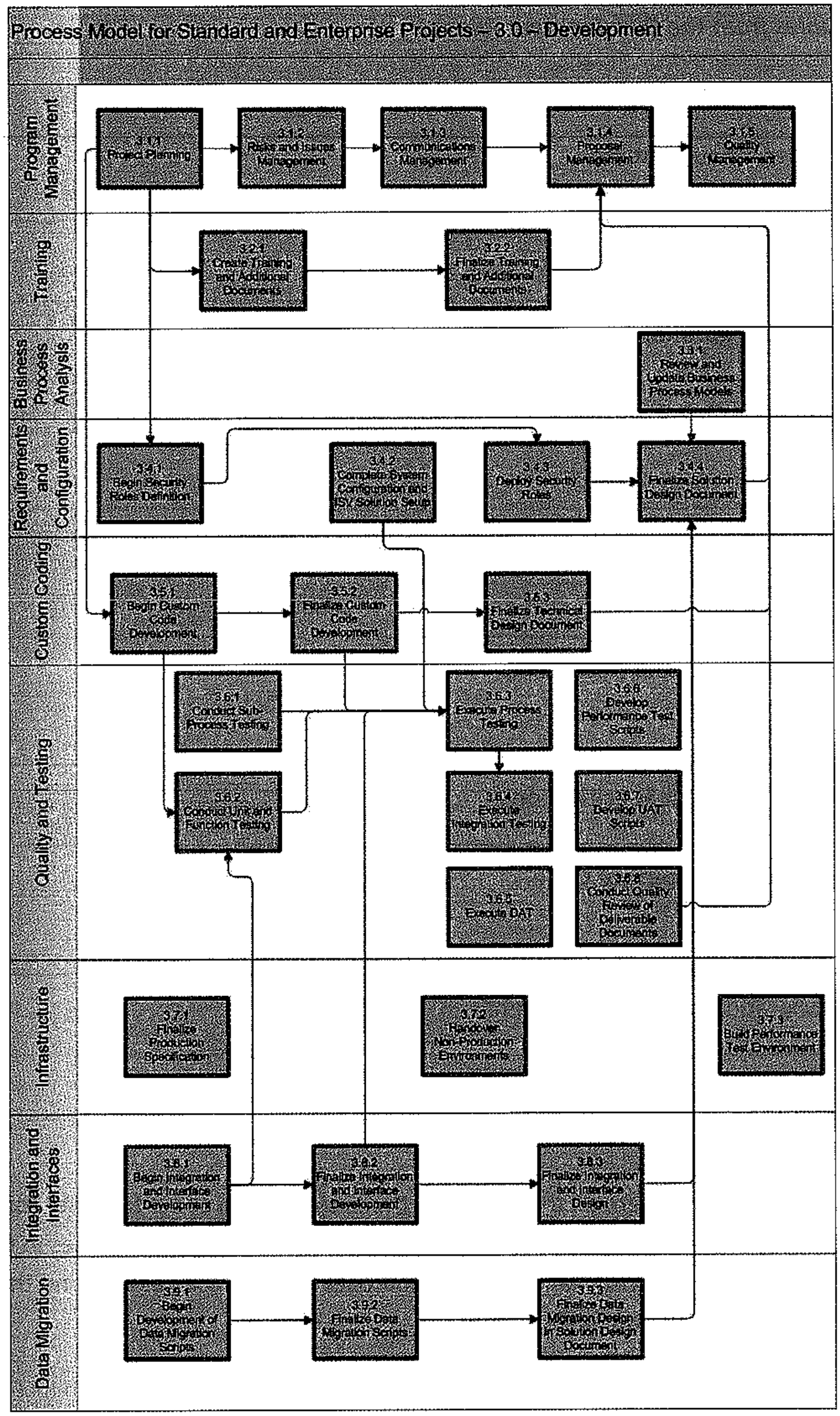
The goal of the Development phase is to build and test the system components defined and approved in the design specifications, including developing the customizations, integrations and interfaces, and data migration processes. The major deliverables include the complete system configuration, completion and freezing of code for customizations, integrations and interfaces, and data migration. Other key deliverables include finalization of the Solution Design Document, and the completion of Data Acceptance, Process and Integration Testing.

The Development phase involves ongoing project management activities to manage risks and issues, communications, change requests and project plan updates. The deployment and knowledge transfer plans that were initiated in the Design phase are updated. The future state business process models is updated and finalized in this phase. The development of the training guides is completed and presented to the customer for review.

The consulting team completes the security role setup and required configurations based upon the design. Custom code development defined in the design specifications is also completed and tested, as is the development effort for integration and interfaces and data migration. Upon completion of all coding efforts, the solution design document is updated to reflect the current design.

Testing completed in this phase includes data acceptance, process, and end-to-end integration testing to ensure that all components of the solution are working together per the design specification. Test scripts for performance test and user acceptance test are also created and finalized.

The infrastructure team completes and provides the customer with the Production environment specification document, so that the customer can start the procurement process for the required hardware and software components. Also, the setup of all non-production environments are completed, and the environments are handed off to the customer. Finally, all deliverables produced in this phase are checked for quality and the phase tollgate review is conducted to ensure that the phase is completed per the quality requirements of the customer. Figure 4 illustrates the key activities for each cross-phase during Development.


Process Model for Standard and Enterprise Projects – 3.0 – Development
Program Management
3.1.1 Project Planning
3.1.2 Risks and Issues Management
3.1.3 Communications Management
3.1.4 Proposal Management
3.1.5 Quality Management
Training
3.2.1 Create Training and Additional Documents
3.2.2 Finalize Training and Additional Documents
Business Process Analysis
3.3.1 Review and Update Business Process Models
Requirements and Configuration
3.4.1 Begin Security Roles Definition
3.4.2 Complete System Configuration and ISV Solution Setup
3.4.3 Deploy Security Roles
3.4.4 Finalize Solution Design Document
Custom Coding
3.5.1 Begin Custom Code Development
3.5.2 Finalize Custom Code Development
3.5.3 Finalize Technical Design Document
Quality and Testing
3.6.1 Conduct Sub-Process Testing
3.6.3 Execute Process Testing
3.6.6 Develop Performance Test Scripts
3.6.2 Conduct Unit and Function Testing
3.6.4 Execute Integration Testing
3.6.7 Develop UAT Scripts
3.6.5 Execute DAT
3.6.8 Conduct Quality Review of Deliverable Documents
Infrastructure
3.7.1 Finalize Production Specification
3.7.2 Handover Non-Production Environments
3.7.3 Build Performance Test Environment
Integration and Interfaces
3.8.1 Begin Integration and Interface Development
3.8.2 Finalize Integration and Interface Development
3.8.3 Finalize Integration and Interface Design
Data Migration
3.9.1 Begin Development of Data Migration Scripts
3.9.2 Finalize Data Migration Scripts
3.9.3 Finalize Data Migration Design in Solution Design Document

Key Deliverables from the Development Phase

Deliverable / Work Product
Training Guides/Documentation
Final Process Models
Final System Configuration
Final Custom Code Development (if required)
Data Acceptance, Process and Integration Testing Complete
Performance Test and User Acceptance Test
Production Environment Specification
Final Integration and Interface Code Development
Final Data Migration Code Development

Deployment

The Deployment phase is where all the efforts of the project team come together for a successful transition to the new Microsoft Dynamics CRM solution. Key activities in this phase include End User Training, Performance Testing and User Acceptance Testing, and the actual cut-over to the new production environment.

The Deployment phase involves ongoing project management activities to manage risks and issues, communications, change requests and project plan updates. The deployment plan that was initiated in the Design phase is finalized and approved by the customer. This plan forms the basis of the deployment or cutover tasks that need to be well managed before go-live.

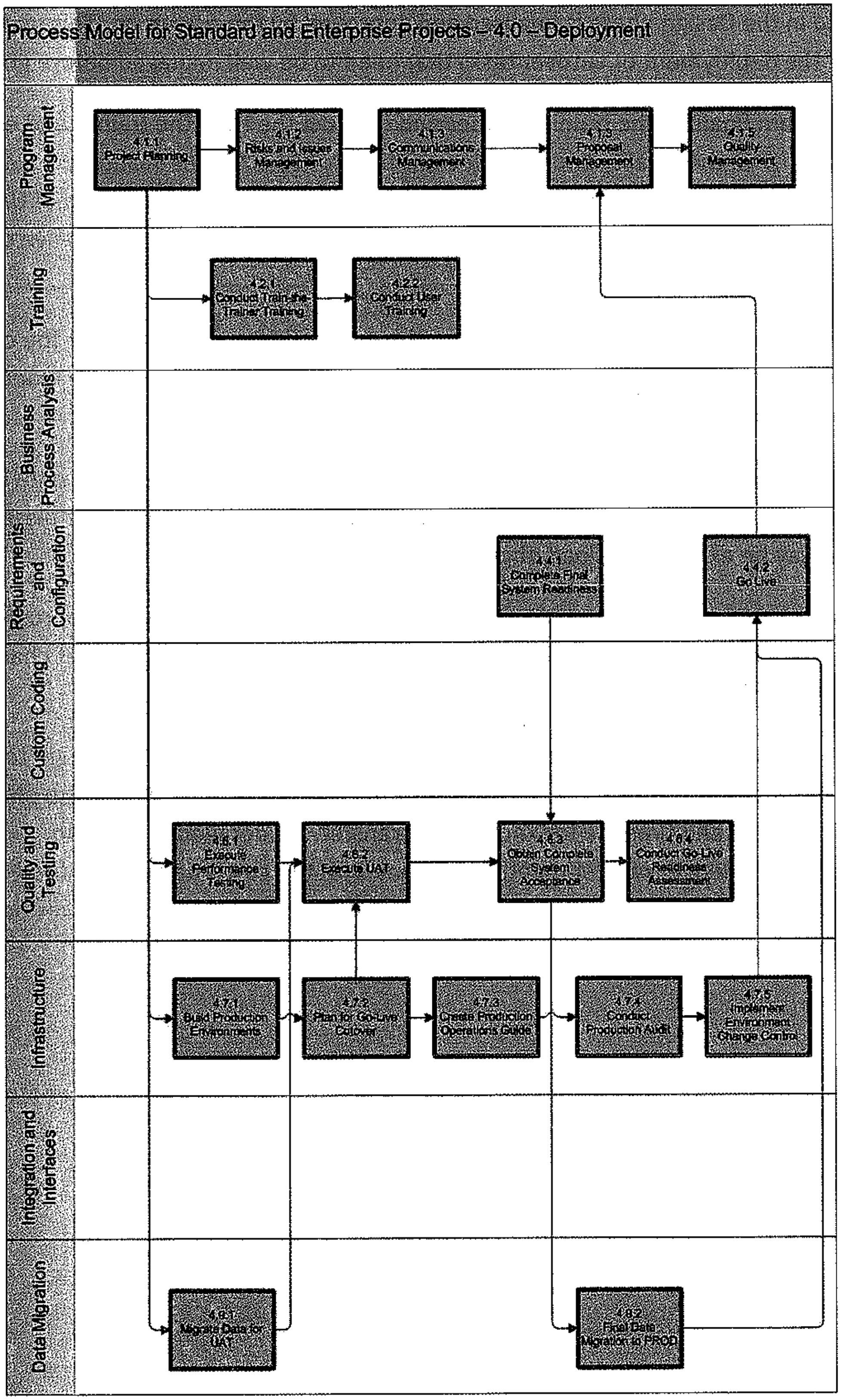
The training team finalizes the training guides and conduct the train the trainer and end user training sessions. In the Quality and Testing cross phase, key activities include the execution of Performance Testing and User Acceptance Testing. Upon successful completion of UAT by Key Users, a business go/no-go decision is made on whether to proceed with the go-live or to defer until any critical issues are resolved.

The infrastructure and technical teams prepare the production environment for the cutover tasks that lead to the go-live state. Required configurations and tweaks may be made, and performance tuning maybe performed if necessary.

Another parallel activity that is performed upon completion of UAT is the initial data load into production by the data migration team. If necessary, once the initial load is complete, periodic batch loads may be executed to load ongoing data from legacy systems.

The team performs a production environment audit and obtains final system approval from the customer. The system is now ready for go-live and any subsequent environment changes are placed under the change control process.

Another key activity in this phase is the knowledge transfer by the consulting team to the customer. This is based on the knowledge transfer plan created during the Design phase which outlines the method and timeline for knowledge transfer. As detailed in the plan, corresponding knowledge transfer meeting sessions with the customer are conducted to cover any items that are pending or need further clarification. Figure 5 illustrates the key activities for each cross-phase during Deployment.



Process Model for Standard and Enterprise Projects – 4.0 – Deployment
Program Management
Training
Business Process Analysis
Requirements and Configuration
Custom Coding
Quality and Testing
Infrastructure
Integration and Interfaces
Data Migration
4.1.1 Project Planning
4.1.2 Risks and Issues Management
4.1.3 Communications Management
4.1.3 Proposal Management
4.1.5 Quality Management
4.2.1 Conduct Train-the-Trainer Training
4.2.2 Conduct User Training
4.4.1 Complete Final System Readiness
4.4.2 Go Live
4.6.1 Execute Performance Testing
4.6.2 Execute UAT
4.6.3 Obtain Complete System Acceptance
4.6.4 Conduct Go-Live Readiness Assessment
4.7.1 Build Production Environments
4.7.2 Plan for Go-Live Cutover
4.7.3 Create Production Operations Guide
4.7.4 Conduct Production Audit
4.7.5 Implement Environment Change Control
4.9.1 Migrate Data for UAT
4.9.2 Final Data Migration to PROD

Key Deliverables from the Deployment Phase

Deliverable / Work Product
Deployment Plan
Train-the-Trainer (TTT) Training
End User Training
User Acceptance Test Results
Final Data Migration
Production Environment Readiness
Production Operations Guide
Cutover to Production

Operation

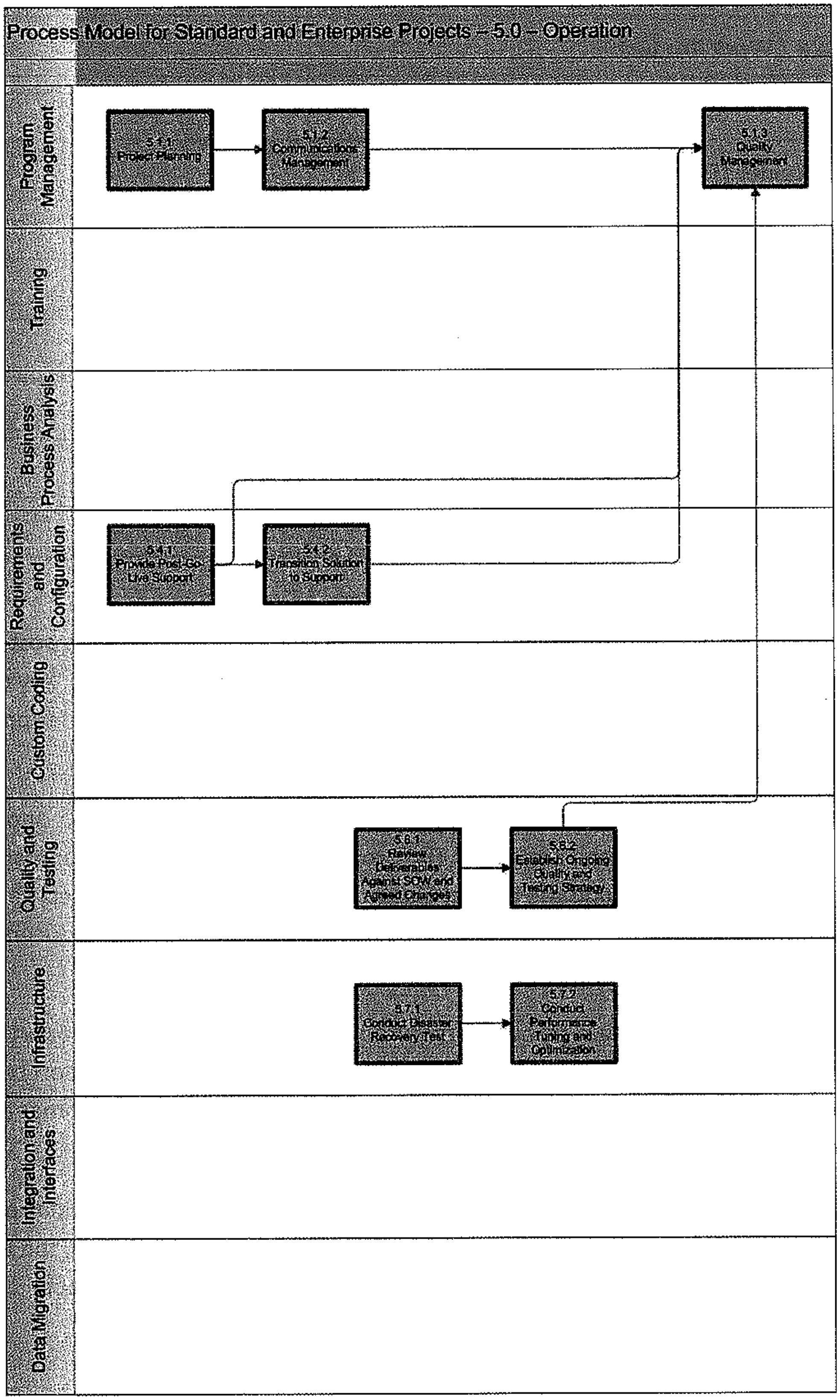
The Operation phase defines the activities required to close the project, provide post production support and transition the solution and knowledge to the customer. Key objectives of this phase include providing post go-live support, transitioning the solution to support, performing a final quality audit, and project closure.

The Operation phase involves the final activities required to close out the project and transition the solution and knowledge to the customer. The Program Management team prepares the final invoices, lessons learned, and the project closure report. The team also prepares a folder with all the project deliverable documents with their acceptance forms. These documents are reviewed with the customer to obtain final approval and acceptance.

The functional and technical team resources required to provide post go-live support resolve any issues that arise out of deployment to the user base. At this point, the support teams are also involved to resolve issues, so that the transition of the solution to the customer and support (per the appropriate support contract) take place smoothly.

Any remaining knowledge transfer items that were not covered during the previous phases are completed in this phase. Upon completion of the post go-live support activities, the team completes all necessary logistical activities and obtains final signoff on the project.

Figure 6 illustrates the key activities for each cross-phase during Operation.



Process Model for Standard and Enterprise Projects – 5.0 – Operation
Program Management
5.1.1 Project Planning
5.1.2 Communications Management
5.1.3 Quality Management
Training
Business Process Analysis
Requirements and Configuration
5.4.1 Provide Post-Go-Live Support
5.4.2 Transition Solution to Support
Custom Coding
Quality and Testing
5.6.1 Review Deliverables Against SOW and Agreed Changes
5.6.2 Establish Ongoing Quality and Testing Strategy
Infrastructure
5.7.1 Conduct Disaster Recovery Test
5.7.2 Conduct Performance Tuning and Optimization
Integration and Interfaces
Data Migration

Key Deliverables from the Operation Phase

Deliverable / Work Product	Description
Project Closure Report	
Project Deliverables	

2.4.17.1.1 A schedule of project phases

Vendor Response (Provide the schedule of project phases)

- Analysis May 30, 2011
- Design July 25, 2011
- Development September 5, 2011
- Deployment February 3, 2012
- Operation June 4, 2012

2.4.17.1.2 The deliverables to be accomplished in each phase.

Vendor Response

Deliverable / Work Product
Project Charter
Project Plan
Risk and Issues Register
Change Control Plan
Communications Plan
User Training Requirements
Future State Business Process Workflows
Fit Gap Analysis
Quality and Testing Standards
Infrastructure Scope Document

Integration and Interface Requirements
Data Migration Requirements
Functional Design Document (FDD)
Technical Design Document (TDD)
Process Test Scenarios
Non-Production Environment Specification
Integration and Interface Design in Solution Design Document (SDD)
Data Migration Design in Solution Design Document (SDD)
Training Guides/Documentation
Final Process Models
Final System Configuration
Final Custom Code Development (if required)
Data Acceptance, Process and Integration Testing Complete
Performance Test and User Acceptance Test
Production Environment Specification
Final Integration and Interface Code Development
Final Data Migration Code Development
Deployment Plan
Train-the-Trainer (TTT) Training
End User Training

User Acceptance Test Results
Final Data Migration
Production Environment Readiness
Production Operations Guide
Cutover to Production
Project Closure Report
Project Deliverables

2.4.17.1.3 The anticipated timeframes within which each phase should be completed; Vendor should complete the entire effort as expeditiously as possible after the contract is awarded but no later than June 30, 2012.

Vendor Response

The implementation would start as soon as possible after the award of the bid. Please reference response to 2.4.17.1.1 for a schedule of project phases.

2.4.17.1.4 Provide the specifications for a test bed environment, affording the State the opportunity to test the proposed solution, and its modifications, without causing any impact to the State's infrastructure, until such time as the State's Project Lead has analyzed and approved the necessary, phased interface for the conversion of the WVDO's current systems.

Vendor Response

A CRM Online test environment will be provided.

2.4.17.1.5 Provide the capability of adequately handling stress testing for times of heavy usage, recovery and security testing, and any other area of system fault-tolerance which the Vendor feels is an asset to their proposed application.

Vendor Response

Stress testing can be performed against the CRM Online test environment.

2.4.17.1.6 As part of the Project Management Methodology, the vendor will work with the Project Team (WVDO, EPMO, and other OT staff), to facilitate knowledge transfer throughout the implementation and testing phases.

Vendor Response

We will work with the Project team to knowledge transfer throughout the entire project.

2.4.17.1.6.1 Pursuant to West Virginia Code SS5A-6-4b, the State's Technology Enterprise Project Management Office (EPMO) has the responsibility for managing information technology projects and providing oversight for state agency information technology projects. EPMO uses a project management methodology based on the Project Management Institute, Project Management Body of Knowledge (PMBOK).

Vendor Response

Even though Project Management Body of Knowledge utilizes different terminology then Microsoft's Sure Step Implementation Methodology, both methodologies are similar in its approach, techniques and deliverables.

2.4.17.1.6.2 Vendor should use a formalized approach to project management, which is compliant with the PMBOK.

Vendor Response

We use the Microsoft Sure Step implementation methodology, which includes a formalized project management approach which should help to align with PMBOK.

2.4.17.1.7 VENDORS SHOULD UNDERSTAND THAT SIGNED ACCEPTANCE, BY THE AUTHORIZED PROJECT LEAD REPRESENTING THE WVDO, IS A REQUIREMENT FOR PHASE COMPLETION ACCEPTANCE.

Vendor Response

We agree with this requirement.

2.4.18. Providing System Warranty, Maintenance & Support for the proposed solution.

2.4.18.1 Provide statewide support, delivery, installation and maintenance of the system resulting from this RFP.

Vendor Response

We will provide installation, maintenance and support services through a combination of on-site work and remote screen-sharing work.

2.4.18.2 Ensure that the primary point of contact for all calls concerning the system is the Help Desk. The maximum acceptable downtime should not exceed the time agreed upon in the service level agreement (SLA) after the award of this contract.

Vendor Response (Provide in detail how you will meet this goal and also provide the system service level agreement parameters for system availability (SLA))

We will be the primary point of contact for support. Microsoft has a 99.9% uptime Service Level Agreement for CRM Online.

The following procedure should be followed for all problems being reported concerning the system:

2.4.18.2.1 Provide online/telephone system support to the WVDO offices beginning at 8:00 am through 5:00 pm Eastern Standard Time Monday through Friday.

Vendor Response

We will provide online/telephone support during those hours.

2.4.18.2.2 The WVDO will contact the vendor and a telephone response should be provided within two (2) hours.

Vendor Response

We will provide a telephone response within 2 hours.

2.4.18.2.3 A qualified technician should respond via phone to address all calls in accordance with the importance and criticality of the question being asked and/or the problem being reported. The vendor should provide on-site technical support for problems that cannot be resolved via telephone or remote access.

Vendor Response

A technician with the proper qualifications will respond.

2.4.18.2.4 No issue should remain unresolved for more than four hours.

Vendor Response

Every effort will be made to not have an issue remain unresolved for more than four hours if the issue is within our control.

2.4.18.2.5 Issues that are not resolved should be directed to the vendor's contract administrator for immediate resolution.

Vendor Response

Issues that are not resolved will be directed to our contract administrator.

2.4.18.2.6 Each request for service should be assigned a tracking number and include specific information related to the call. The successful vendor should provide a weekly log of trouble calls and the status of the resolution of each issue.

Vendor Response

Support tickets will be created for each request for service, and will have a ticket number and will include all of the specifics about the call. We can provide a weekly log of support tickets including the status and resolution.

2.4.18.2.7 Provide WVDO with a reporting mechanism to track the status of all open service calls. Calls should not be closed until the WVDO Help Desk approves the resolution of the call.

Vendor Response

The WVDO Help Desk will have access to a report to track the status of all open service calls. We will not close the support ticket until the WVDO Help Desk approves the resolutions of the call.

2.4.18.3 Provide a (one (1) year) maintenance period after the final acceptance and the system is in production with no additional cost to the State. During this time the vendor will be required to provide software upgrades and services necessary to keep the system operational. After the maintenance period has expired, the State will require two (2), one (1) year maintenance renewal options.

Vendor Response (Describe the methodology for providing routine software/system updates. Also, provide detailed directions for, and description of, this software maintenance.)

Microsoft will periodically install CRM Update Rollups on the CRM Server. Sometimes that will also require installing a CRM Update Rollup to the Outlook CRM Client, which can also be deployed via Windows Updates.

If a workstation is only using the web browser to access CRM, they do not need any update on the workstation.

2.4.18.4 Ensure that the original software, source code, object code and all modifications, throughout the life of any agreement resulting for the release of this RFP, will be held in escrow, to be released to the agency upon termination and/or completion of said agreement. It is further understood that the State will retain a perpetual license to the object code.

Vendor Response

The Microsoft Dynamics CRM source code is not able to be held in escrow.

2.4.18.5 Any upgrades or system modification should be installed from the central server to all of the workstations (up to hundred (100) work stations) to insure that all machines are functioning on the same version of the software.

Vendor Response

For Web Access, the software only has to exist on the web server, so updates only have to be in one place.

For the CRM For Outlook Client, updates can be pushed out through Windows Updates.

2.4.18.6 The vendor is responsible for distributing modifications to all workstations (up to hundred (100) work stations) once modifications have been tested and approved by WVDO management.

Vendor Response

CRM screen and report customizations are published from the server, and do not require going to the workstation.

When CRM Update Rollups are released for the Outlook CRM Client, we can determine the best course of action to update a workstation, be it using Windows Update or manually updating the workstation.

2.4.19. Providing Backup & Disaster Recovery services

2.4.19.1 Providing backup and disaster recovery components for the proposed solution. Extreme measure should include but are not limited to a backup server that is a mirror image of the primary server. The backup server should ensure that no information is lost and that the proposed solution is capable of restarting in-progress processes.

Vendor Response

For CRM Online, in the event of a data center connectivity issue, services switch over to a backup data center. Additionally, there are redundant network components for disaster recovery purposes.

For CRM On-Premise, multiple options exist. The CRM application server must be backed up, as well as Active Directory, and the SQL Server and related databases. With CRM On-premise, there can be multiple CRM application servers to enable redundant web access to the software. For SQL Server, SQL cluster could be created and used. Backups should be taken of the SQL CRM and related databases, as well as the CRM application server files and registry entries.

2.4.19.2 Provide for daily, operational backup of the proposed system.

Vendor Response (Describe, in detail the recommended methodology for daily, operational backup of the proposed system)

A nightly backup of the CRM system is performed, including the SQL CRM and related databases, as well as the CRM application server files and registry entries.

2.4.19.3 In the event of a disaster, ensure that the WVDO business operations are not suspended for more than twenty-four hours.

Vendor Response

In the event of a disaster, a backup system could be brought online.

2.4.19.4 In the event of a power outage and/or network disruption, provide capabilities of recovering data from processes that are in progress.

Vendor Response

Processes are performed by the server, so workstation power outages and/or network disruptions will typically not interfere with a process running on the server.

2.4.19.5 Provide recovery mechanisms, including, but not limited to: fail-over capabilities, and time to recovery of system.

Vendor Response (Describe in detail proposed recovery mechanisms, including, but not limited to: fail-over capabilities, and time to recovery of system.)

For CRM Online, in the event of a data center connectivity issue, services switch over to a backup data center in a relatively short period of time.

For CRM On-Premise, using multiple CRM application servers can provide real-time failover in case one of the application servers fails. For SQL Server, a cluster can be created and used, which also provides real-time failover in case one SQL Server fails.

If only one CRM application server and one SQL Server are used for on-premise, daily backups of the databases and logs will be taken, and can be restored in case of SQL failure. With SQL, using database mirroring or similar would let you have a duplicate copy of the data, and then would just need to rename the server, to the same name as the crashed server, in the case the main one crashed. That would get your databases back quickly. For the CRM application server, it could be as simple as a software install on a server, or again maintaining a duplicate server and then re-name it.

2.4.20. Provide a system response time for approximately three (3) seconds for a round trip transaction (from the client to the web server to the database and back). The vendor should also describe how they will remedy situations where the response time is not adequate.

Vendor Response (Describe in detail how the situation will meet this goal in addition to describing how they will remedy situations where the response time is not adequate)

Response time for a round trip transaction can be impacted by a lot of factors including the local Internet connectivity speed, therefore an exact time cannot be guaranteed. If there are performance problems, then we would go through a series of troubleshooting procedures to find the issue.

2.4.21. Provide an interface for mobile devices including but not limited to Smartphones, iPads, laptops and Netbooks.

Vendor Response

Microsoft Dynamics CRM can be used on mobile devices in a number of ways. For Windows Mobile devices, there is a CRM client. For other smartphones, they can access a CRM where it will serve up web pages built for a small phone screen. In terms of other devices, it can run on devices that have Internet Explorer. There are also multiple, competing third-party applications for providing smartphone access to Microsoft Dynamics CRM.

Attachment B: Mandatory Specification Checklist

Mandatory specifications contained in Section 2.5 on page 49

2.5.1 The database technology used must be Microsoft SQL Server or equal (the state has standardized on Microsoft Products).

Vendor Response

Microsoft Dynamics CRM only runs on Microsoft SQL Server.

2.5.2 System must be able to retrieve detail and summary data by specific items, with the ability to filter and modify the data within the reports.

Vendor Response

CRM is able to retrieve detail and summary data and has the ability to filter the data for reports.

2.5.3 The solution must have the ability to block some data points on reports and prevent printing to hard copy.

Vendor Response

CRM has field level security which is also enforced in reports. It is very hard to stop a user from printing a hard copy of information in a Windows system.

2.5.4 The vendor's solution must provide a certified interface with Federal Government's Small Business Assistance process (http://www.sba.gov/private/edmis2/private/).

Vendor Response

The web URL is invalid, so it is difficult to determine what is required of this interface.

2.5.5 The solutions must provide access and ability to update information from international locations.

Vendor Response

The data can be updated from anywhere, including international locations.

2.5.6 Solution shall provide the capability to report by United States Congressional District and West Virginia County.

Vendor Response

CRM can report by United States Congressional District and West Virginia County.

2.5.7 The successful vendor understands that a Confidentiality Agreement must be signed to access information found within the WBDO's records. These WVDO records include any information that can identify a person/company including, but not limited to the name, address, telephone number or employment information of any person or organization data.

Vendor Response

It is understood that a Confidentiality Agreement would be signed.

2.5.7.1 The successful vendor and its employees, agents, contractor, subcontractors, agree to comply with the Confidentiality Agreement and all personnel who will have access to the WVDO's records must sign a Confidentiality Agreement prior to access within the WVDO's records. Failure to comply with this provision may affect deadlines required by the Vendor. The Vendor agrees that failure to submit Confidentiality Agreements for all Vendor users of the WVDO's records constitutes a breach of the Agreement and the WVDO may terminate the Agreement without consequence to the WVDO on that basis.

Vendor Response

We understand and agree with what is stated in 2.5.7.1.

2.5.7.2 The successful vendor hereby agrees that it will only access information as required to perform its duties under the Agreement. The Vendor understands that it is required to secure the information that it accesses as part of this Agreement and to ensure that it is not accessed by unauthorized individuals, released to any other persons, companies or entities.

Vendor Response

We understand and agree with what is stated in 2.5.7.2.

2.5.7.3 The successful vendor agrees to keep all personal and non-personal information accessed for WVDO is confidential and protected from intentional and unintentional disclosure.

Vendor Response

We understand and agree with what is stated in 2.5.7.3.

2.5.7.4 The successful vendor must take all reasonable precautions to protect against unauthorized access or release of WBDO's data records, confidential records or confidential information in its custody; The Vendor will follow the notification requirement if it discovers that information or services provided under this Agreement have been disclosed or are being used in violation of, the West Virginia Records Disclosure Act, the federal Privacy Act of 1974 or any other state or federal laws. The Vendor shall also immediately notify the WVDO within twenty four (24) hours by telephone 304.558.2234 and the West Virginia Office of Technology at 304.558.9966 or 877.558.9966 if it discovers that personal information provided under this Agreement have been disclosed and/or being used in violation of the Agreement, or state or federal laws.

Vendor Response

We understand and agree with what is stated in 2.5.7.4.

2.5.7.5 The successful vendor acknowledges that authorized access or transactions provide no right to possession or ownership by the Vendor to the WVDO's data records.

Vendor Response

We understand and agree with what is stated in 2.5.7.5.

2.5.7.6 The successful vendor must ensure that it does not aggregate information or create any databases to information which it has access, including WVDO's data and data submitted by testing applicants for the purpose of building comprehensive data records or for any other purpose.

Vendor Response

We understand and agree with what is stated in 2.5.7.6.

2.5.7.7 The successful vendor must not access or retain any data submitted by testing applicants or by the WVDO for any reason.

Vendor Response

We understand and agree with what is stated in 2.5.7.7.

2.5.8 The State will require the vendor to extend the system warranty period if identified deficiencies have not been corrected.

Vendor Response

We agree that the system warranty period may be extended in this scenario.

I certify that the proposal submitted meets or exceeds all the mandatory specifications of this Request for Proposal. Additionally, I agree to provide any additional documentation deemed necessary by the State of West Virginia to demonstrate compliance with said mandatory specifications.

IntelliPoint Technologies

(Company)

Dennis Barry, President

(Representative Name, Title)

(304) 733-3687

(Contact Phone/Fax Number)

May 5, 2011

(Date)

Attachment D: Vendor Preference Certificate & Purchasing Affidavit

Rev 09/08

State of West Virginia

VENDOR PREFERENCE CERTIFICATE

Certification and application* is hereby made for Preference in accordance with ***West Virginia Code***, §5A-3-37. (Does not apply to construction contracts). ***West Virginia Code***, §5A-3-37, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the ***West Virginia Code***. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Resident Vendor Preference, if applicable.

1. **Application is made for 2.5% resident vendor preference for the reason checked:**

____ Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or,**

_✓_ Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; or 80% of the ownership interest of Bidder is held by another individual, partnership, association or corporation resident vendor who has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or,**

____ Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or,**

2. **Application is made for 2.5% resident vendor preference for the reason checked:**

____ Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or,**

3. **Application is made for 2.5% resident vendor preference for the reason checked:**

____ Bidder is a nonresident vendor employing a minimum of one hundred state residents or is a nonresident vendor with an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia employing a minimum of one hundred state residents who certifies that, during the life of the contract, on average at least 75% of the employees or Bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or,**

4. **Application is made for 5% resident vendor preference for the reason checked:**

____ Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or,**

5. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**

____ Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or,**

6. **Application is made for 3.5% resident vendor preference who is a veteran for the reason checked:**

____ Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) reject the bid; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Under penalty of law for false swearing (West Virginia Code, §61-5-3), Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: INTELLIPOINT TECHNOLOGIES Signed: [signature]

Date: MAY 5, 2011 Title: PRESIDENT

Check any combination of preference consideration(s) indicated above, which you are entitled to receive.

RFQ No. DEV 11/42 108

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

DEFINITIONS:
"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceed five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (***West Virginia Code*** §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name: INTELLIPRINT TECHNOLOGIES, LLC

Authorized Signature: [signature] Date: MAY 5, 2011

State of WV

County of Cabell, to-wit:

Taken, subscribed, and sworn to before me this 5 day of May, 2011.

My Commission expires June 27, 2011.

AFFIX SEAL HERE

OFFICIAL SEAL
NESTER WHITE
NOTARY PUBLIC
STATE OF WEST VIRGINIA
1000 Fifth Ave.
Huntington, WV 25701
My Commission Expires June 27, 2013

NOTARY PUBLIC [signature]

Attachment E: Staff Professional Certifications

Kevin Evans

is hereby officially certified as a

Microsoft® Business Solutions Certified Professional

in Microsoft CRM Installation & Configuration v. 1.2

This certificate has been issued in recognition of professional competence and the ability to perform tasks associated within the certified discipline.

Issued on: 1/3/2006

Issued by: Microsoft Business Solutions

Microsoft Solutions

Director, Microsoft Business Solutions Global Training

Microsoft

Microsoft CRM Customization R1.2

Score Report

Name: Kevin Evans

Exam: Microsoft CRM Customization R1.2

Exam Number: MS-03-020

Date: 23-Jan-2006

Your Examination Results

Required Score:	70%
Your Score:	84%
Your Grade:	Pass

Scored Section With Percentage

Architecture	80%
Workflow	93%
Customisation	73%
SDK	80%
Crystal Enterprise Reporting	100%

Please note that this is a preliminary report.
Your exam will now be reviewed. If you have met the passing score and if the exam qualifies you for a certification.

You will receive your official certificate by mail.

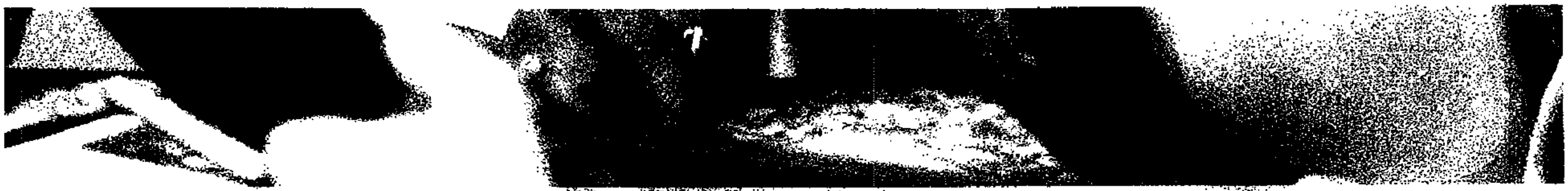
Thank you for participating in the Microsoft Business Solutions Professional Certification Program.

YOU CAN AUTHENTICATE THIS SCORE REPORT USING A DIGITAL EMBOSSER!

Digital embossing maintains the integrity of this testing program and the value of your certification. Digital embossing eliminates the possibility of unauthorised embossing of counterfeit score reports.

Authenticate this score report at ***http://www.pearsonvue.com/authenticate***

Registration Number: ***214081447*** ***VALIDATION NUMBER: 541080060***



Kevin Evans

is hereby officially certified as a

Microsoft® Business Solutions Certified Master
in Microsoft CRM Application

This certificate has been issued in recognition of professional competence and the ability to perform tasks associated within the certified discipline.

Issued on: 6/15/2006

Issued by: Microsoft Business Solutions

Microsoft *Solutions*

Director, Microsoft Business Solutions Global Training

Joshua Vega

is hereby officially certified as a

Microsoft® Business Solutions Certified Professional

in Microsoft CRM Installation & Configuration 1.2

This certificate has been issued in recognition of professional competence and the ability to perform tasks associated within the certified discipline.

Issued on: 10/18/2005

Issued by: Microsoft Business Solutions

Microsoft
Solutions

Director, Microsoft Business Solutions Global Training

Joshua Vega

is hereby officially certified as a

Microsoft® Business Solutions Certified Professional

in Microsoft CRM Customization 1.2

This certificate has been issued in recognition of professional competence and the ability to perform tasks associated within the certified discipline.

Issued on: 10/27/2005

Issued by: Microsoft Business Solutions

Microsoft
Solutions

Director, Microsoft Business Solutions Global Training

Joshua Vega

is hereby officially certified as a

Microsoft® Business Solutions Certified Professional

in Microsoft CRM Applications Professional 1.2

This certificate has been issued in recognition of professional competence and the ability to perform tasks associated within the certified discipline.

Issued on: 10/31/2005

Issued by: Microsoft Business Solutions

Microsoft
Solutions

Director, Microsoft Business Solutions Global Training

Microsoft Certificate of Excellence

Achievement Date: January 21, 2009

CHRIS ISBELL

Has successfully completed the requirements to be recognized as a Microsoft® Certified Technology Specialist: Microsoft Dynamics® CRM 4.0 Installation and Deployment

OFFICIAL SEAL OF MICROSOFT CERTIFICATION

Steven A. Ballmer
Chief Executive Officer

Certification Number: C953-9158

Microsoft CERTIFIED
Technology Specialist

Microsoft Dynamics® CRM 4.0 Installation and Deployment

Microsoft Certificate of Excellence

Achievement Date: January 30, 2009

CHRIS ISBELL

Has successfully completed the requirements to be recognized as a Microsoft® Certified Technology Specialist: Microsoft Dynamics® CRM 4.0 Customization and Configuration

Steven A. Ballmer
Chief Executive Officer

Certification Number: C953-9156

Microsoft CERTIFIED
Technology Specialist

Microsoft Dynamics®
CRM 4.0 Customization
and Configuration

Microsoft Certificate of Excellence

Achievement Date: December 19, 2008

CHRIS ISBELL

Has successfully completed the requirements to be recognized as a Microsoft® Certified Technology Specialist: Microsoft Dynamics® CRM 4.0 Applications

Steven A. Ballmer
Chief Executive Officer

Certification Number: C953-9157

Microsoft CERTIFIED Technology Specialist

Microsoft Dynamics® CRM 4.0 Applications

Microsoft Certificate of Excellence

Achievement Date: August 12, 2010

NASHA M HAMRA

Has successfully completed the requirements to be recognized as a Microsoft® Certified Technology Specialist: Managing Microsoft Dynamics® Implementations

Steven A. Ballmer
Chief Executive Officer

OFFICIAL SEAL OF MICROSOFT CERTIFICATION

Microsoft Certified

Certification Number: C089-8225

Microsoft CERTIFIED Technology Specialist

Managing Microsoft Dynamics® Implementations

Attachment F: Case Studies

Pennsylvania Office of Attorney General – Microsoft Dynamics CRM

Government Agency Cuts Development Time by 75 Percent with xRM Platform

The Pennsylvania Office of Attorney General needed to provide software solutions to support a variety of business needs, but development was time consuming and expensive. After experiencing success using Microsoft Dynamics® CRM to develop a mail-tracking application, the agency turned to the xRM platform, upon which Microsoft Dynamics CRM is built, to rapidly create relational line-of-business applications. By doing so, it reduced development timelines by approximately 75 percent. IT staff members can now respond to business needs far more quickly, developing a range of xRM-based solutions—from case-expense tracking to home-improvement contractor registration. The applications have been readily accepted by users because of their familiar interface and intuitive functionality. Most importantly, the agency now has the agility to better serve its users and its constituents.

Situation

The Pennsylvania Office of Attorney General is responsible for criminal law, civil law, and public protection for the state's 12 million citizens. The agency handles everything from complaints about elder abuse to the investigation of organized crime.

Providing such disparate services requires a dedicated staff of more than 850 employees, as well as the technology to support them. However, the agency employs a limited number of application developers, which makes it difficult to create the custom solutions that business users require to effectively do their jobs and seamlessly interact with the public. "We had a fairly extensive 'laundry list' of requested software applications awaiting development," says George White, Chief Information Officer for the Pennsylvania Office of Attorney General. "With a limited number of developers on staff and a growing list of applications that needed to be built, we could only produce so many solutions in a given time using traditional development methods."

The agency tried to respond to business needs by hiring contractors and outsourcing some of its development efforts, but that soon grew expensive. "Outside developers charge at least $75 per hour, and just one outsourced project could cost $100,000 or more," says Tron Keefer, Business Integration Group Manager for the Pennsylvania Office of Attorney General.

The agency also ran into issues after launching custom software solutions because it was so time consuming—and therefore costly—to amend them. "Users were afraid to ask for helpful changes because we'd typically have to say 'No' on the grounds that it just took too long to go back and rework the application," says Keefer. "Many actually adjusted their business processes to fit the software application, rather than the other way around."

The Pennsylvania Office of Attorney General wanted to better serve its user community and, ultimately, its constituents. So it sought a platform on which to quickly and cost-effectively build solutions for areas as diverse as outreach, safety and security, disaster recovery, restitution, and consumer protection.

Solution

In March 2007, the Pennsylvania Office of Attorney General undertook an initiative to replace a legacy application for tracking the paper mail that it receives. Of all the customer relationship management (CRM) products that it considered, it chose to build its application on the xRM platform, which underpins Microsoft Dynamics® CRM, because of the flexibility, comparative low cost, and integration with products that the agency already used, such as Microsoft® Office Professional 2007, Microsoft Office SharePoint® Server 2007, and Microsoft SQL Server® 2005 data management system. The agency soon expanded the solution to handle telephone, e-mail, and in-person interactions with the public. "We were not only able to replace functionality, but also to enhance the application's capabilities so that we could better serve our constituent base," says White.

Upon the success of the mail-tracking application, the agency realized that the xRM platform could be used for much more. "We saw that [it] had considerable potential for use as a rapid application development platform for all the 'Constituent Relationship Management' solutions we needed," says Keefer.

The Pennsylvania Office of Attorney General sent two of its staff developers for in-depth technical training, and they returned with many innovative ideas. Recalls White, "We all sat down and determined that we could use xRM to complete our list of projects in a fraction of the time that it would take if we stuck with traditional development approaches."

To confirm its confidence in the xRM platform as the means to resolve a myriad of issues, the agency attended an Architecture Design Session at the Microsoft Technology Center (MTC) in Reston, Virginia, in December 2007. The session lasted a day and a half, during which the group reviewed the agency's list of potential projects and discussed business requirements, obstacles, and how to overcome them. "We came away from the MTC convinced that we could do what we wanted to with this tool—and we even had a road map to follow for tackling our list," says Keefer.

Developing Pilot Solutions

Following the MTC engagement, the agency decided to conduct a test of xRM rapid application development capabilities. Keefer assigned an intern—with no development experience—to recreate three Intelligence Audit applications. Agency auditors needed the applications to help manage field data regarding police-department tracking of convicted sex offenders, child abusers, and other crimes covered under Pennsylvania's Criminal History Record Information Act.

Previously, the agency hired a senior-level contract developer, who took more than three months to write just one of th applications using traditional development methods. "In two weeks, our intern produced for free what a skilled developer needed three months and more than $50,000 to develop," says Keefer. "Plus, the intern's application had a better interface and more robust functionality than the original one. For instance, agency auditors can put the application on a portable computer for use in the field in disconnected mode, for added flexibility."

Adds White, "Seeing how quickly and easily we could add complexities and functionality to our business applications made it pretty clear that this was a tool that really did work and fit our needs."

Creating Line-of-Business Applications

Based on that initial success, the Pennsylvania Office of Attorney General embarked on a series of development projects, all based on the xRM platform. For each project, the agency's IT staff used a "mind-map" approach to brainstorm, develop a solution strategy, and outline the potential application's business requirements. Junior members of the development team then took the requirements and created the application's look and feel, drop-down lists, fields, and other features. More-experienced developers only became involved to help develop workflow processes, business logic, integration with the agency's other line-of-business applications, and any other more-complex tasks.

- **Education and Outreach**
  One of the applications that the Pennsylvania Office of Attorney General developed using the xRM platform is for its Education and Outreach Section, which manages outreach to schools, senior centers, and so on. That department receives numerous requests for agency speakers and participation in events, and staff needed a wa to track those requests and ensure that the appropriate speaker, materials, and equipment arrived at each event. Previously, the department used Microsoft Office Word 2007 documents and Microsoft Office Excel® spreadsheets for tracking information, but staff encountered version-control issues, data inaccuracies, and other problems.

The agency decided to develop an application to give department staff the ability to log all pertinent information related to each education-outreach request, monitor that data, allocate speakers and material resources, and estimate attendee numbers and anticipated guests. "I assigned a developer who had experience with Cold Fusion but none with Microsoft technologies, and he completed the project in only two weeks," says Keefer. The developer created an application that makes it possible to store and track a variety of related information in the same place and generate automated monthly reports. Notes White, "Because they weren't overly technical, the end users in that department were fairly apprehensive—even reluctant—to try the new application. But they did and they love it."

- **Home-Improvement Contractor Registry**
  The Pennsylvania Office of Attorney General got an unexpected opportunity to take further advantage of xRM in December 2008 when the state passed a law that requires all home-improvement contractors in the state to register with the agency before doing projects that cost more than U.S.$5,000. The agency would need to process the influx of contractor registrations, which contractors were required to submit no later than July 1, 2009. That meant that the IT staff needed to produce a solution by the end of March 2009 to accommodate contractors who wanted to register early.

  The agency's legislative affairs office asked IT to enable the agency to accept online as well as mailed registrations and credit card payments through the solution. "This was new territory for us," admits Keefer. "There are a lot of potential hurdles when it comes to building essentially an e-commerce site and taking into account the necessary precautions to safeguard all that personal information we'd be receiving."

  The development team was able to quickly build the solution's back-end system using the xRM platform. Developers combined an existing xRM-based application with Office Word 2007 to accelerate the staff review and approval process. They added functionality, such as the ability to instantly generate a letter to alert a contractor that the form could not be processed due to insufficient data. "Despite the aggressive timeline, we were ready to go two weeks ahead of schedule," says White. "That would have been a whole lot harder to do, even with extra contract developer help, had we not used Microsoft."

- **Case-Expense Tracking**
  As of May 2009, the most complex solution that The Pennsylvania Office of Attorney General has developed on xRM is a case expense-tracking application, which is used by the agency's Bureau of Narcotics Investigation, Organized Crime, and Gaming sections. These departments often work on multijurisdictional investigations with local law enforcement agencies, the United States Federal Bureau of Investigations, and other groups. In a multijurisdictional case, personnel are required to track all the expenses that they incur related to that investigation so that the agency can either request reimbursement or provide it, depending on the case.

  Years before, developers used Oracle Forms to build an application for tracking all of those expenses. The agency now wanted to provide its users with more advanced functionality, including business logic and workflow processes to automate and streamline expense review and approval. IT had outsourced the project, but the contracted developers worked for two years and only reached the testing phase, during which agency end users found so many problems that IT eventually cancelled the project.

  Based on what it had already accomplished using xRM, IT decided to satisfy its expense-tracking needs with an in-house solution. A single developer produced a rich application—with extensive business logic, fund-movement tracking, invoicing, reporting, and other functionality—within six months. "When the end users tested it and could find no bugs and no error messages, they were literally in tears because they were so happy with the solution," recalls Keefer.

  The Pennsylvania Office of Attorney General expects the new case expense-tracking solution to be in full production in June 2009. The solution will interoperate with the agency's Buy Money solution, which developers also built using the xRM platform and which helps track serial numbers on United States currency as undercover agents use those dollars for law enforcement-related activities, such as buying drugs on the street.

  The xRM-based expense-tracking solution will interoperate with the agency's investigation management system. The solution automatically pulls data from the investigation management system so that staff members no longer retype the same data into two separate applications. Says White, "Creating streamlined, integrated solutions like these saves time and ensures greater accuracy and consistency of our information."

  The application also ties in with Microsoft SQL Server 2005 Reporting Services to give users the ability to generate sophisticated reports, and it works with Microsoft Exchange Server 2007 e-mail messaging and collaboration software for automatic e-mail notifications and with Office Word for easy forms generation.

Continuing to Extend the xRM Platform

The Pennsylvania Office of Attorney General used xRM as the basis for more than a dozen applications, and that number is growing. Keefer recently turned to the xRM platform to provide a detailed inventory of the agency's IT environment for disaster-recovery purposes. "Our inventory constantly changes, so I created an application that tracks all change requests and automatically notifies IT as to which IT assets are affected by a particular change," says Keefer. "At any given time, we can print an up-to-date, custom report of every server, database, application, vendor contact information and responsibilities, and every other aspect of our environment. If something were to happen to our data center, we could rebuild everything using that report."

Benefits

The Pennsylvania Office of Attorney General made a significant commitment to development using xRM, and that commitment is paying off for the agency. "We've adopted Microsoft xRM as a development platform for building feature-rich applications in greatly accelerated timeframes," says White. "With it, we can deliver 90 percent of the applications that we need to build for our user community, and at a low cost."

Faster Development

The Pennsylvania Office of Attorney General has found that developing on xRM takes significantly less time than on a traditional development platform. "On average, we're able to develop applications at least four times faster instead of traditional methods," says Keefer. "We get so much more functionality out of the xRM applications than we did with custom applications."

For instance, the agency uses the security model found in the xRM platform to extend security beyond the presentation layer to the data layer. "We're provided with complete data and presentation layers, which often are the most time consuming to produce in custom development. We save at least six months of development time because we don't have to come up with that functionality on our own," says Keefer. "Plus, we don't have to worry about the data model and user interface. Instead, we can focus on the heart of the application—the business logic. Because we don't have large numbers of developers and project managers, it's a real advantage to use built-in functionality to compress the software development life cycle."

Agility to Support the Business

The agency's use of xRM has helped it better respond to the state's needs. "Right now Pennsylvania, like many states, is facing a tight budget situation," says White. "Hiring new IT staff or bringing on contractors is not likely due to fiscal restraints, yet the pressure to serve federal, state, and internal agency needs is unabated. We have to think of ways to be smarter, faster, and do more with what we have."

For its home-improvement contractor application, the agency had to develop a solution that could accommodate the content from an eight-page registration form and the complexities of accepting contractor payments. And it had to do so within an ambitious timeframe. "The ability to not only meet but exceed our deadline with a solution that delivers high levels of functionality is what we need in IT today," says White. "Government needs to be more innovative and aggressive in its approach. Microsoft [xRM] is the tool that we're banking on to help us get there. It's a tool that facilitates the responsiveness of our organization without sacrificing any of the functionality that we want in our applications."

Flexibility to Adapt to Business Processes

The agency's IT staff can now quickly adjust solutions to meet users' existing processes so that agency employees can work comfortably and efficiently. IT staff recently demonstrated an xRM–based application for a new group of end users, some of whom asked for a few additions and adjustments. Says White, "When our developers immediately made their requested changes right there in the room in front of the users—and got them right—one end user said, 'I'm so happy, I could cry.' Every CIO wants to hear that! It speaks volumes about the product's capacity for complex but usable applications."

Adds Keefer, "We can accommodate significantly more change requests, and users have been completely amazed at how quickly we adapt solutions for them. They used to have to take what they got and alter their business processes to accommodate the software, but now we invert that."

Developers and users alike appreciate the ability to accommodate user requests well after the requirements-gathering stage. "The ability to fine-tune solutions has created a really positive view of the xRM applications," says White. "The opportunity to go back and address oversights lends credibility to our developers and what they're building."

Ease of Use for Increased User Acceptance

The Pennsylvania Office of Attorney General believes that its use of the xRM platform boosts user acceptance of new applications. "The importance of building a solution that's intuitive and easy for end users to work with should not be underestimated," says White. "Using xRM fosters greater user acceptance, addresses long-standing frustrations with the agency's previous applications, and enables us to provide our user community with streamlined yet robust solutions to meet the agency's business needs."

One of the reasons that the new applications have produced high rates of acceptance is the consistent look and feel of the applications. "By building solutions using xRM, we deliver a consistent presentation and intuitive navigation," says White. "Our users can follow the same logical sequencing within the different applications they use."

Many agency employees work with multiple xRM–based solutions, so the fact that those solutions have similar interfaces and similar steps for adding, finding, sorting, merging, and exporting information helps increase effectiveness and productivity. "Users respond well to the familiarity of the applications and need minimal training," says Keefer. "And once they've worked on one application, they're able to get up and running really quickly on others because the solutions have similar core functionality."

Low Costs

For the Pennsylvania Office of Attorney General, xRM provides a cost-effective platform for rapid application development. "In this economy, we need to use the resources we have at hand and make the most of our time and dollars," says White. "When you make an investment in Microsoft, [xRM] you're not receiving just one application; you can deploy hundreds of applications with the same license. We've used Microsoft technology as a true development platform and spread its cost across multiple applications, resulting in far better payback and a faster return on investment."

Adds Keefer, "Using one platform to solve so many business problems without custom development or additional, specialized software saves us a lot of time and money. I estimate that it would cost us millions of dollars more if we had to generate all these applications using custom development, contractors, and outsourcing. Our new development approach gives us the best of both worlds. We no longer have the time and expense associated with developing from scratch but our 'off-the-shelf' tool is highly customizable and flexible."

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:
www.microsoft.com/dynamics

Governments Streamline Citizen Services With Microsoft Dynamics CRM Online

Cloud-based version of new CRM offering helps government agencies reduce costs, improve citizen engagement and increase transparency.

Microsoft®
Download image

REDMOND, Wash., Jan. 18, 2011 /PRNewswire/ -- Microsoft Corp. (Nasdaq: MSFT) today showcased examples of how government organizations are using the recently announced Microsoft Dynamics CRM to improve citizen services, reduce operational costs and boost productivity. Unveiled yesterday by Microsoft CEO Steve Ballmer, Microsoft Dynamics CRM Online is the cloud service of the new Microsoft Dynamics CRM 2011 solution that is helping both public and private-sector organizations respond to the people they serve efficiently.

In order to achieve aggressive goals around transparency, cost reductions and moving IT to cloud computing, many state, local and federal leaders are turning to commercial off-the-shelf-based solutions that are geared to aid in public-sector missions. Through the deployment of Microsoft Dynamics CRM Online, government agencies reap the flexibility, scalability and cost savings that a cloud-based solution offers, in addition to improved access to real-time data. Microsoft Dynamics CRM Online provides the foundation to assist across many aspects of government scenarios — from grants management and 3-1-1 citizen response to Freedom of Information Act (FOIA) requests and intra-agency tasking. In addition, it gives agency personnel the familiar Microsoft Outlook experience, browser and mobile access to their information, a RoleTailored design, and advanced user personalization to help them increase their productivity.

"Often, our government customers' first experience with the Microsoft Dynamics CRM Online platform sparks the imagination and appetite to tackle other business challenges," said Senior Director — Public Sector Amir Capriles at Microsoft. "The return on investment is realized very quickly due to the ease of user adoption and the ability to invest once and leverage the many applications available to government."

Several Microsoft partners and customers are building customized solutions using Dynamics CRM Online to address key challenges facing government agencies.

- Rock Solid Technologies, in an effort to reduce operational costs while still delivering quality citizen services, moved its flagship application, Respond, to the cloud using Microsoft Dynamics CRM Online. Respond is a citizen relationship management solution for municipalities and government agencies to monitor and control service requests. Microsoft Dynamics CRM Online is helping Respond not only improve reaction times to service requests and citizen interactions, but it has streamlined the agencies that utilize the technology. Rock Solid is working with the city of Carmel, Ind., to migrate to Microsoft Dynamics CRM Online for its 3-solution to intake citizen concerns and provide a closed-loop response.
- Microsoft is offering Microsoft's Grants Manager Accelerator, an application that helps government agencies streamline the grants process from initial solicitation through application, review, scoring, award and progress reporting, via the cloud with Microsoft Dynamics CRM Online. Microsoft Dynamics CRM Online provides an alternative to its existing CRM 4.0 on-premises deployment, enabling government agencies to field a solution accelerator more quickly.

- Jim Townsend, president of InfoStrat, and one of two partners who helped Microsoft build this solution, noted, "The availability of Microsoft's Grants Manager Accelerator on Dynamics CRM 2011 will transform how agencies manage, review, process and track billions of dollars of government grants. We can't wait to see where this takes the market."
- Eskel Porter Consulting Inc. is offering its Public Records Tracker application based on Microsoft Dynamics CRM Online to help federal, state and local government agencies manage, track and respond to citizens' requests for information and meet FOIA-compliance requirements. The move to the Microsoft cloud has increased accessibility to the Public Records Tracker application, and now users can request information anywhere there is an Internet connection and access to Windows Internet Explorer.
- Engage Inc., a leading innovator for line of business and communication-as-a-service offerings across both public and commercial sectors, has enhanced its USFederal360 offering for federal agencies and departments by announcing the addition of Governmental Relationship Management (GRM 2011). GRM 2011 launching in concert with Microsoft Dynamics CRM 2011 Online, delivers a robust contact and correspondence management for public-sector staff, elected officials and related private-sector organizations.
- The Broomfield Economic Development Corp. (EDC) is adopting Microsoft Dynamics CRM 2011 coupled with a code set designed for economic development organizations. This system allows the agency to track and manage existing industry accounts and new industry projects to ensure that its entire team has full visibility of each job-creating opportunity. The company desired a cloud-based solution that could be accessed via the Microsoft Outlook interface to manage all communication and reporting information. The solution is provided by Microsoft Partner SRC Technology Solutions. Chattanooga Chamber of Commerce's Economic Development Team used this solution to manage the complex process of landing a large automotive assembly plant that will create thousands of direct jobs. In addition, all the automotive suppliers that are coming to the region are managed in Microsoft Dynamics CRM as New Industry Projects. The automotive suppliers significantly add to the job creation totals, which have an enormous, positive effect on Hamilton County (or Chattanooga) and surrounding counties. In fact, every industry and existing industry project for this community of 350,000 people lives inside Microsoft Dynamics CRM.

Those interested in learning more about the benefits of Microsoft Dynamics CRM and signing up for a free trial should visit http://crm.dynamics.com/en-us/industries/government.aspx.

To follow and engage with the Microsoft Dynamics CRM community visit http://www.twitter.com/msdynamicscrm and #crm2011.

About Microsoft Dynamics

Microsoft Dynamics is a line of easy-to-use, integrated and adaptable ERP and CRM applications that enable business decision-makers to quickly respond to market shifts, take advantage of new trends, increase their competitive edge and drive business success. Microsoft Dynamics solutions are delivered through a world-class network of reselling partners providing specialized services and additional innovation to help customers excel in their industries.

About Microsoft

Founded in 1975, Microsoft (Nasdaq "MSFT") is the worldwide leader in software, services and solutions that help people and businesses realize their full potential.

SOURCE Microsoft Corp.

Featured Microsoft solution

Create and maintain a clear picture of citizen needs, from first contact to service fulfillment

Microsoft Dynamics® is a complete citizen relationship management solution that delivers faster customer services, keeps staff updated on the latest trends and statistics, and provides citizens with convenient access to records and services.

This solution provides all of the tools and capabilities needed to easily create and maintain a clear picture of citizen needs, from first contact through to service fulfilment.

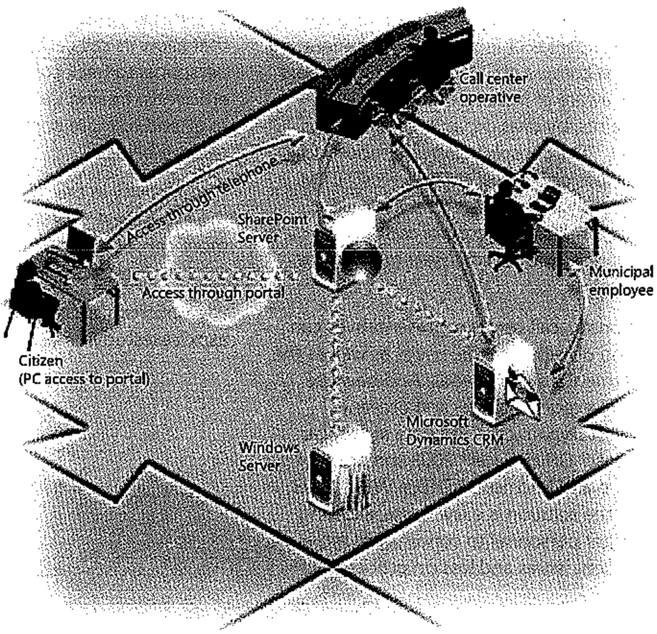
By streamlining government processes and integrating seamlessly with other Microsoft® productivity tools, Microsoft Dynamics® simplifies record keeping and case management for government staff.

Relevant Microsoft technologies

- Microsoft Dynamics® CRM Windows Server,
- Microsoft® Internet Information Server
- Microsoft® Office SharePoint® Server
- Microsoft® Office system
- Microsoft® .NET Framework
- Microsoft® .NET Framework

The Web server application runs on Windows Server® and Microsoft® Internet Information Server. Microsoft® SQL Server® is used as the primary data store for the applications.

Overall system control and remote diagnostics is done with Microsoft® System Center Configuration Manager while the Microsoft® Office system is used for report generation and basic report filtering. Kiosks running on Windows® NT workstations and the IVR system also operate on the Microsoft® platform.



Microsoft and our solutions partners can help your organization connect and integrate your systems

Microsoft Certified Partners are independent companies that can provide you with the highest levels of technical expertise, strategic planning, and hands-on skills. In terms of case and records management for example, they can help your government organization to:

- Provide more proactive, citizen-centric services by analyzing citizen interaction data to identify trends
- Increase efficiency by providing easy-to-use systems that extend current IT investments and help streamline processes, freeing up funds and resources for citizen services
- Provide citizens with enhanced complaint management systems, claims processing, incident reporting, economic development initiatives, voter registration, and benefits management
- Allow all requests to be tracked through the system to completion, which can help reduce call-backs and improve satisfaction, because citizens receive the answers they need the first time
- Ensure compliance with regulations through built-in tracking and reporting tools
- Collect, compile, and organize data from the field or from remote offices, and then synchronize it with other organizational platforms

www.microsoft.com/csp

Microsoft

Delivers insight and improves responsiveness

Thanks to better reporting and tracking of complaints and resolutions, the Department now has a better understanding of its performance, which it can measure statistically. Microsoft Dynamics® CRM also shows historic views of ongoing issues and their resolution, which gives the Department the ability to more accurately keep track of divisional responses. This improved management capability has helped the Department be more responsive to its constituents.

Because the Department can now easily categorize complaints handled by different divisions, it has greatly improved insight into what companies or individuals are generating the most complaints. Department managers can be aware of increased numbers of complaints, by division, and respond. Says Stewart, "The consolidation and reporting capabilities of [Microsoft Dynamics®] CRM have greatly improved our service levels. We have much more control over our information, and we can use it much more effectively."

Additionally, call center representatives can focus on division-specific issues as well as the Department's overall needs. And because they can export, analyze, and present Microsoft Dynamics® CRM data in familiar Microsoft® Office Excel® 2003 spreadsheet software and Microsoft® Office Word 2003 tables, the solution is easy to use, allowing call center personnel to concentrate more on constituent issues and less on processes.

Boosts call center productivity by 50 percent

The Department of Corporations can modify Microsoft CRM to its needs with little effort and minimal IT involvement. When personnel are added to or removed from the system, or when a complaint case involves a new business, Department workers can easily change user status or add cases using a drop-down list. "[Microsoft Dynamics®] CRM provides the flexibility we need to make quick ad-hoc changes without relying on a consultant and without using IT time," says Stewart.

By taking advantage of the extensibility and flexibility of Microsoft Dynamics® CRM, the Department added a range of capabilities that allow its call center and divisional personnel to track complaints much more efficiently, freeing up time for program staff to attend to more important, regulatory responsibilities.

"Productivity in the call center increased to the extent that we can respond to 50 percent more constituent calls than before we had the solution," says Stewart.

www.microsoft.com/casestudies/casestudy.aspx?casestudyid=49766

Partner(s): Eskel Porter Consulting

Software & Services:
- Microsoft Dynamics®
- Microsoft® Offce Excel®
- Microsoft® Offce Word

Microsoft

Improve information management and transform the way you respond to Citizens

The California State Department of Corporations deployed Microsoft Dynamics, CRM in an effort to become more responsive to the citizens they served. As a result the department's customer service operation can now efficiently receive and track all public concerns and provide departmental responses accordingly. On top of this, the department's call center has increased its call handling capability by 50 percent.

California's Department of Corporations licenses a broad range of businesses, including stock brokers and dealers, escrow companies, and mortgage bankers. It also regulates securities sales, franchises, and off-exchange commodities.

When the state made it a high priority to provide better service to the public through effective, contemporary information technology, the Department recognized that it had an opportunity to vastly improve its customer service by implementing a centralized complaint and inquiry information management system at its call center in Sacramento.

The Department wanted to have the ability to act more proactively on the public's behalf by responding to a higher volume of calls, delivering prompt, helpful responses, and reliably tracking issue and resolution information.

The Department's call center wanted to track complaints and inquiries centrally for all departmental divisions, and give customer service staff access to all records. When citizens or businesses sought information or feedback on their concerns, the call center team needed to respond promptly with relevant information, preferably without forwarding calls to somebody outside the call center.

Improved customer service

The implementation began with the migration of 45,000 records into Microsoft Dynamics® CRM, which took only 16 hours. The remainder of the roll-out took four months. Microsoft Dynamics® CRM is now used by 25 state employees and managers; 8 people in the call center use it, as well as 17 people in the Enforcement division and the Securities Regulation division.

"We wanted a software solution that we could implement with minimal integration challenges," says Julie Stewart, Manager of the Consumer Services Office at the Department of Corporations. "In addition, we wanted to be able to customize the solution with ease, and extend it as our requirements changed. Microsoft CRM offered the best value in all of these areas."

Streamlines constituent service and information management

The implementation of Microsoft Dynamics® CRM allowed the Department to consolidate its complaint tracking, greatly simplifying processes. Today, the Department offers a single, easy-to-use complaint form, which is easy for constituents to complete and for Department employees to review. In addition, Microsoft Dynamics® CRM makes it easier for call center agents to respond quickly and with consistency to continuous public demand for information on Department programs.

"The public has responded very favorably to the Department's improved customer service made possible with Microsoft Dynamics® CRM," says Stewart.

> "The consolidation and reporting capabilities of [Microsoft Dynamics®] CRM have greatly improved our service levels. We have much more control over our information, and we can use it much more effectively. "
>
> *Julie Stewart, Manager, Consumer Services Office, Department of Corporations*

Overview: The Department of Corporations in California delivers better, more responsive services to citizens through deploying Microsoft Dynamics® CRM, which provides the department's call center team with easily accessible information about constituents.

Business Situation
In order to provide better service to the public, the Department of Corporations needed a consolidated, department-wide system for tracking and responding to complaints and questions.

Solution
The department implemented Microsoft Dynamics®, empowering its customer service teams to better serve the public by using comprehensive, readily accessible information.

Benefits
- Streamlines constituent service and information management
- Delivers insight and improves responsiveness
- Boosts call center productivity by 50 percent
- Allows further service improvements

Improve citizen services and relationship management

Citizens today expect individualized, online services. To meet these demands, many government organizations are improving access to their services through intuitive Web portals, as well as intelligent contact center and case management solutions.

A Microsoft Dynamics® case and records management solution provides the tools and capabilities needed to create and easily maintain a clear picture of citizens' needs, from first contact through to service fulfillment, maintaining individual records that are easy to manage and access online.

This solution uses an intuitive, easy-to-use interface to help streamline important tasks such as grant writing, field inspections, and call center management.

Any electronic communication with citizens (or even internal communications) can be easily organized, stored, and tracked. In this way, outreach awareness of services is improved, specific needs of groups within the community can be met, costs can be lowered, and citizen satisfaction can be improved.

Using a Web portal tightly integrated with Microsoft Dynamics®, you can create a single point of contact for a variety of government services: everything from claims processing to complaint management, incident reporting, voter registration and benefits management.

All requests can be tracked through the system to completion, which can help to reduce call-backs and improve satisfaction by giving citizens the answers they need, first time. Citizens also enjoy the flexibility of being able to make applications and obtain services using their PC, PDA or over the phone.

A Microsoft Dynamics® solution promotes smooth interaction between different government agencies, too. For example, you can route case assignments efficiently and assign them to caseworkers with the appropriate skills and experience. You can also streamline evaluation processes by electronically storing forms, applicant history, past agency action, and more.

With streamlined processes, your staff become more responsive in real-time, and can provide faster customer service through quick, convenient access to records.

Standardized workflows also enable them to adhere to regulations and controls, manage grants and budgets proactively, and streamline accounting processes. Tight integration with the Microsoft® Office system enables government staff to pull information from Microsoft Dynamics® into Office system applications such as Microsoft® Office Excel® and Microsoft® Office Word, and share it with different government agencies and departments.

"We take great pride in our work and the way we carry it out means our standards for customer-service delivery are extremely high. Microsoft Dynamics® had to meet those standards and it did."

Caron Bentley, CRM Project Manager, South Gloucestershire Council

Are your **people ready**?