



REQUEST FOR PROPOSAL CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

Request for Proposal Outline Customer Relationship Management (CRM) System

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ORGANIZATIONAL BACKGROUND

VISIT PENSACOLA is an independent non-profit 501.C.6 destination organization for Escambia County which includes Pensacola, Pensacola Beach, and Perdido Key. With over 460 years of rich history, 18 miles of sugar-white sand beaches, and the emerald-green waters of the Gulf of Mexico, visitors from all over the world are lured to its pristine shores every year. Visit Pensacola supports the community vision of tourism by serving as the central body responsible for building tourism as an economic engine for our community through leadership, connection, collaboration, and communication. Visit Pensacola is supported by 189 members and by direct funding from Escambia County.

Visit Pensacola operates two Visitor Centers located in Escambia County. This year we are also extending our reach to assist visitors and locals by installing Visit Pensacola kiosks in high traffic areas of Escambia County. We currently employ 12 full-time staff and part-time Visitor Center Ambassadors.

Value of Tourism

In Pensacola, tourism is a top economic driver. In Escambia County, visitors spent over \$930 million in 2019. As a result, tourism provides employment opportunities at all levels, from entry-level to C-suite. In Escambia County, 19,243 people are employed which is 14% of all jobs in Escambia County. Those seeking work find plenty of opportunities thanks to our healthy tourism industry.

RFP OVERVIEW

Visit Pensacola seeks a contractual relationship with a firm to provide a CRM solution and support. We are looking for a partner vested in the interest of making the Pensacola Bay Area a preferred tourism destination.

The contract for services will be between the awarded company and Visit Pensacola. Proposals may be submitted electronically. Proposals should be sent to Shawn Brown, Digital Marketing Manager, at sbrown@visitpensacola.com. The contract will cover a three-year period with options to extend up to two additional years. Proposals are due back no later than April 8, 2022, and the system will need to be fully operational by September 30, 2022.

CRM BACKGROUND

Visit Pensacola is currently using a CRM provided by Simpleview. The following is a breakdown of our current CRM functionality.

- Current CRM includes the following groups:
 - Tourism Partners
 - Sales Group
 - o Group Tours/Travel
 - Media/PR
 - RSVP Events
 - Inventory Management
 - Inquiry Group (consumer group)
 - Calendar of Events
 - Partner Extranet
 - Mint Integration
- CRM Integrates with the following applications:
 - VisitPensacola.com Website the website connects to the CRM via an API provided by Simpleview to feed partner listings, offers and events.
 - Website forms Our current CRM allows us to build forms for data collection.
 These forms live either in the CRM or on our website.
 - Act-on Act-on is our email marketing platform. The CRM syncs data to ensure contacts are up to date on both platforms.
 - Visit Apps our mobile application.
 - o True Omni Kiosks located at high traffic locations in Escambia County.
 - Partner Extranet The partner extranet gives access to partners to manage contacts, leads, update facility amenities, update website listing, post special offers, events, and order sales materials such as our Insider Guide.
 - Marketing Dashboard Our marketing dashboard integrates with our CRM and Google Analytics to allow us to build custom reports and dashboards.

CRM REQUIREMENTS

The CRM should provide the following functionalities:

- Data Migration
- Integrate third-party APIs such as
 - o VisitPensacola.com
 - o Act-on
 - Visit Apps
 - o True Omni
- Reporting
- Modules/or support for the current user groups listed under CRM Background. Please explain in detail how the new CRM will support each of these areas.
- Training and Support

PROPOSAL CONTENTS

The following should be included in your proposal:

- Your company history and background
- Describe the project management process
- Description of professional qualifications of project team/account team
- Describe technical support and escalation response time
- Detail price structure per CRM user
- Previous client list with references noted
- Functional Requirements please describe features and capabilities for each item below.
 - Sales Management
 - Group Management
 - Media/PR
 - Marketing
 - Reporting
 - Consumer
 - Interface
 - o Partner data updates such as a portal partners can use to update their data.
- Please describe how you will address each of the items listed under CRM Requirements.
- Training please describe the training provided to internal staff and partners (if needed).
- Costs data migration, ongoing support, and any additional add-ons.

EVALUATION CRITERIA AND PROCESS

The projected budget for this website is to be determined based on the proposal selected. The selection will be done by internal staff and then presented to the Finance Committee for review and then the Board of Directors for approval.

Each bidder must include an estimated timeline with potential major milestones listed.

Proposals will be assessed accordingly to the following criteria:

CRM Capabilities 35

 Marketing, Sales, Reporting, Group Sales Inquiry groups and each feature to support the different areas.

CRM Integration for Website/API

35

- Seamless Integration to data feed for website
- Supports Visit App
- Integrates with Act-on, True Omni, etc.

Relevant Experience

25

- Working with other like-sized destinations
- Staff size and experience

Cost & Support Options

5

Services provided in relation to the fee charge

TERMS AND CONDITIONS

- Visit Pensacola is not liable for costs incurred by bidders prior to execution of a contract.
 All expenses incurred as a result of this bid request, including travel and personnel costs, are the sole responsibility of the bidder.
- Visit Pensacola reserves the right to reject any bids that do not address all terms and conditions of this bid request. In addition, Visit Pensacola reserves the right to reject any and all bids, at any time, if it is determined to be in the best interest of the organization.
- The awarded contractor is encouraged to become a Visit Pensacola corporate tourism partner and maintain said membership throughout the contract term.
- The bid prices must include all labor, materials, freight, taxes, insurance, etc.
- The contractor is responsible for all acts and omissions of employees or sub-contractors while performing any work-related directly or indirectly to contracted scope of work.
- Contractor acknowledges that a negotiated percentage of payment will be reserved until Visit Pensacola accepts the final work product.
- News releases or the release of information in any form of media pertaining to this bid request, the service or project to which it relates shall not be made without prior approval from Visit Pensacola.
- Visit Pensacola acknowledges that information obtained from bidders may be proprietary.
 Upon receipt and acceptance of any bid resulting from this request, Visit Pensacola
 affirms confidentiality of all information contained in the bid document. Only the committee
 and select staff members shall have access to information and will treat information as
 confidential.

OTHER RESPONSE AND SUBMISSION REQUIREMENTS

- A. Submission Guidelines
- 1. Notify Shawn Brown, Digital Marketing Manager, of intent to bid at sbrown@visitpensacola.com.
- 2. A digital proposal is due to Shawn Brown at Visit Pensacola on or before April 8 at 5 p.m. CST. No extensions will be granted. All proposals should be emailed to sbrown@visitpensacola.com

B. Timeline

RFP Sent	March 18, 2022
Receipt of proposals	April 8, 2022
Evaluation of proposals	April 11 - April 20, 2022
Interviews	April 21 – 22, 2022
Recommendation of award to	April 26, 2022
finance	
Recommendation of award to the	April 27, 2022
Visit Pensacola Board of Directors.	
Award Notification	April 28, 2022
CRM fully functioning	September 30, 2022

