Request for Proposal (RFP)

Project Title

Custom CRM & Project Management System for Picklo Homes

Project Overview

Picklo Homes is a small custom home building and remodeling business seeking a custom CRM and project management system. The goal is to streamline client intake, manage project documentation, schedule follow-ups, and provide a secure client portal integrated with OneDrive. The system should enhance our workflow and ensure a user-friendly, mobile-responsive experience for both our team and our clients.

Background

We are a team of three, with two primary users, specializing in custom homes, renovations, and remodels. Currently, our processes are largely manual and spread across various tools. We require an integrated solution to improve efficiency, communication, and project management, ensuring that we can manage client interactions and project workflows from a single platform.

Objectives

- Automate and streamline client intake and follow-up processes.
- Provide a secure client portal for accessing project-related documents and submitting forms.
- Manage projects with detailed templates, scheduling, and task tracking.
- Enhance on-site documentation with photo uploads and notes.
- Ensure mobile access, calendar integration, robust security, and scalability for future growth.

Scope of Work

The project scope includes, but is not limited to, the following components:

1. Client Intake & Follow-Up

- **Integration:** Connect with our website's submission form for automated client intake.
- **Manual Entry:** Ability to manually input client data.
- **Notes & Reminders:** Interface for logging call/meeting notes and setting automated follow-up reminders at 24 hours, 7 days, and 30 days.

2. Client Portal

- **Secure Access:** Develop a client login area integrated with OneDrive for accessing project-related documents.
- **Forms & Uploads:**

- Provide functionality for clients to upload selections or complete a PDF selection form.

- Incorporate a warranty request form (mirroring our existing web form) that triggers automated email notifications.

- Enable clients to upload photos and add notes for warranty requests.

3. Project Management

- **Project Templates & Phases:**

  - Create or implement templates that outline major construction phases and include detailed sub-tasks with to-do lists and note-taking.

- **Scheduling:**

  - Develop a scheduling module that allows for updates and fine-tuning of project timelines.

  - Display project schedules in a Gantt chart format.

- **Job Site Documentation:**

  - Enable the addition of job site photos with notes to document project progress.

4. Additional Enhancements

- **User Dashboard:**

  - A central dashboard that provides overviews of upcoming follow-ups, active projects, and recent client activities.

- **Calendar Integration:**

  - Synchronization with popular calendar apps (e.g., Outlook, Google Calendar).

- **Mobile Responsiveness:**

  - A design optimized for mobile access to accommodate on-site updates.

- **Notifications & Alerts:**

  - Real-time alerts for new client submissions, document uploads, or warranty requests.

- **Security & Access Control:**

  - Implement robust security measures including multi-factor authentication and role-based access controls.

- **Backup & Data Recovery:**

  - Automated data backups with a clear recovery plan.

- **Scalability:**

  - Ensure the system is designed with future growth in mind.

Deliverables

- A fully functional CRM and project management system meeting the outlined specifications.

- Detailed documentation, including user guides and technical specifications.

- A testing and deployment plan.

- Post-launch support and training for our team.

Timeline

- **RFP Release Date:** [Insert Date]

- **Proposal Submission Deadline:** [Insert Date]

- **Vendor Selection & Notification:** [Insert Date]

- **Project Kick-Off:** [Insert Date]

- **Expected Completion:** [Insert Date]

Budget

Please provide a detailed cost estimate for the project, including development, implementation, testing, and post-launch support. Indicate any options for ongoing maintenance and potential future enhancements.

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Demonstrated understanding of project requirements.

- Technical expertise and relevant experience.

- Proposed timeline and project plan.

- Cost-effectiveness and clarity of pricing.

- Quality of previous work and client references.

- Post-launch support and training capabilities.

Submission Guidelines

Interested vendors should submit their proposals electronically to **nick@picklohomes.com** by [Submission Deadline]. All proposals should include:

- A company profile and relevant project experience.

- A detailed project plan and timeline.

- A cost breakdown.

- References from previous clients.

- Any additional materials that demonstrate your expertise and approach.

Contact Information

For any questions or additional information, please contact:

- **Name:** Nick Picklo
- **Title:** Vice President
- **Email:** nick@picklohomes.com
- **Phone:** 713-562-0009

We look forward to receiving your proposal and potentially partnering with you to develop a solution that meets our needs.