

## T8- Final RFP

Team 13  
Professor Sirugudi  
CIS 235

### Team Member Info

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### Introduction

Company Overview:

- Northwind Traders is a dynamic firm that is committed to offering high-quality products and services to its clients. With a focus on operational excellence and client satisfaction, Northwind Traders has established itself as an industry leader.

Project Overview:

- The implementation of two critical systems—a Customer Relationship Management (CRM) system and a Demand Forecasting system—has been mandated by our Chief Information Officer (CIO) as part of our continuous efforts to improve operational efficiency and satisfy our customers' changing expectations. These systems are essential to our strategic goals and will be crucial in helping us streamline our operations, make better decisions, and expand our company.

**Transactional system:** Customer Relationship Management

**Analytical system:** Demand Forecasting system

### Budget and Duration

- Customer Relationship Management(CRM): Estimated budget of \$400,000, with an expected duration of 3 months for full integration.
- Demand Forecasting System: Estimated budget of \$270,000, with a similar timeframe for full integration.

### Scope of Work

- Customer Relationship Management
  - Has features that align with current business processes
  - A platform that centralizes customer data and interactions

- Flexible to integrate with existing systems such as current automation tools in the sales department
- Able to develop customer segments to support marketing campaigns
- Demand Forecasting System
  - Implements a software forecasting model to predict demand for products
  - Integrates with the business's sales data and current market trends to generate highly accurate forecasts
  - Capable of forecasting algorithms and other analytical tools to identify future trends
  - Training support for current employees such as the planning team
- Project Management Methodology:
 

The Agile project management methodology has been chosen for both projects. Agile emphasizes breaking down projects into stages to foster cooperation and ongoing development. Its iterative nature allows for adjustments to changing requirements, making it an ideal approach for project management.
- SDLC Process and Accountability Sharing
  - Planning Phase:
    - The internal team will primarily lead this phase, with input from external vendors as needed.
  - Analysis Phase:
    - The internal team will work closely with external vendors to ensure requirements are accurately captured.
  - Design Phase:
    - The internal team will collaborate with external vendors to ensure the design aligns with business needs.
  - Development Phase:
    - External vendors will be responsible for the development tasks, with oversight from the internal team.
  - Testing Phase:
    - Both the internal team and external vendors will collaborate to ensure thorough testing.
  - Deployment Phase:
    - The internal team will coordinate deployment activities, with support from external vendors as needed.
  - Maintenance Phase:
    - The internal team will oversee maintenance activities, with assistance from external vendors for any technical issues.
- ❖ Collaboration: Regular status updates and effective communication between the internal team and external vendors to ensure alignment with company objectives.

**Barriers to completion:**

- Potential barriers could be the new training time/adjustment period required to fixate on this new project software.
- Cost is always a factor as there is no such thing as a free lunch, however, our project team do think monitoring the budget would be wise as to be a bit more conservative in our approach when implementing new systems of information management.
- Also to play devil's advocate to that point our team just made would be to allow a bit of cost fluctuation and flexibility when adding these new programs as there are always more issues than you can ever truly prepare for.

**Selection criteria:**

The ideal vendor(s):

- Has experience building and implementing a CRM and forecasting software
- Has the knowledge and technical abilities to execute our needs within our budget and time frame
- Has the technical knowledge to quickly and efficiently turn our many spreadsheets' data into a cohesive system with as little manual work as possible
- Will build and implement systems that are best for our specific processes and data rather than a generic solution (unless a generic solution is what would benefit us most)

**Submission Process:**

Submissions should be sent electronically via email by the submission deadline.

Contact Information-

Email: [info@northwindtraders.com](mailto:info@northwindtraders.com)

Phone number: 123-456-7890

Project name: CRM and/or Demand Forecasting

Company name: Northwind Traders

Address: 1234 Business Ave

City, State, Zip: Tempe, AZ 85281

Timeline-

Submissions must be submitted by May 10, 2024. Decisions will be made by May 30, 2024.

Submissions must include:

- A general overview and description of the firm and the credentials and experience of the team in question
- A one-page narrative outlining the firm's strengths and distinguishing skills as they relate to our company and our needs
- Descriptions of past projects that are relevant and provide experience for the project at hand

**Venders to whom the RFP will be sent:**

- 1. Salesforce (Einstein Analytics Platform)**
- 2. Microsoft (Microsoft Dynamics 365)**
- 3. Oracle (Oracle Cloud CX, Oracle Analytics Cloud)**