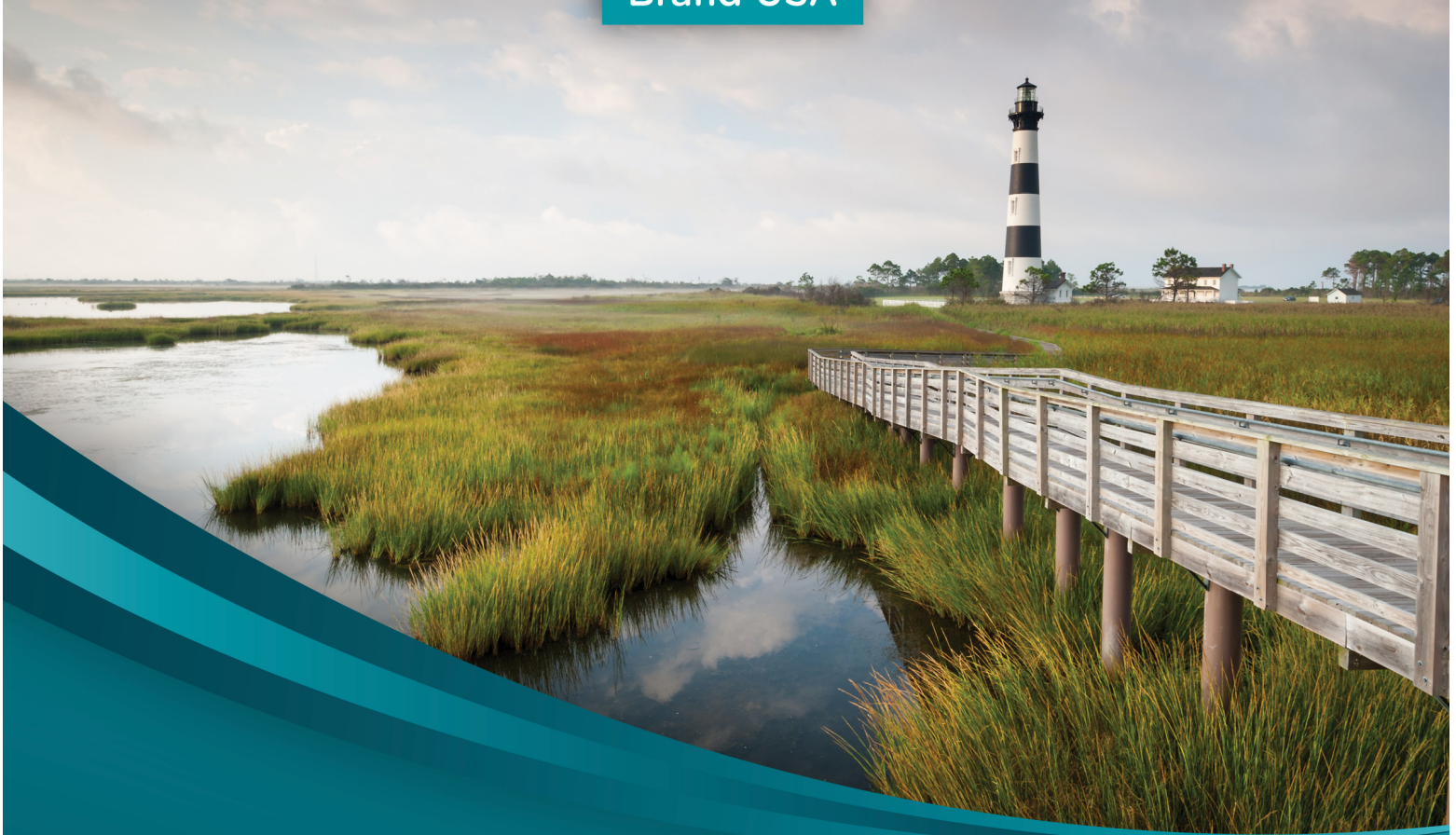


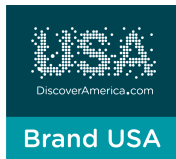
Brand USA



# REQUEST FOR PROPOSAL

CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

SEPTEMBER 30, 2015



# Request for Proposal

## INTRODUCTION

Brand USA is a public-private not for profit organization created by the Travel Promotion Act of 2009. The mission of Brand USA is to generate increased international visitation to the United States and to grow its share of the global travel market. Brand USA will accomplish this via marketing campaigns and programs and partnerships with the travel industry. The incremental increase in international visitation will generate billions of dollars of revenue, which will in turn create new American jobs.

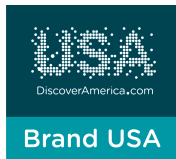
While the United States welcomed 60 million visitors in 2010, its share of the international travel market has decreased significantly over the past decade. The U.S. share of long haul international travel fell from 17.2 percent in 2000 to 12.4 percent in 2010. Brand USA, the U.S.'s National Tourism Marketing Organization will reinvigorate the nation's image and recapture its share of the market.

Brand USA is governed by an 11-member Board of Directors. Each director is appointed by the U.S. Secretary of Commerce. Each director represents a sector of the travel and tourism industry as identified by the Travel Promotion Act. The executive leadership team possesses strong expertise and experience in the travel, tourism, and advertising industries.

Brand USA is committed to including diverse firms as an important part of its sourcing and procurement activities. In furtherance and support of this goal, we encourage minority, women and locally-owned firms to pursue business opportunities with us. Minority and women-owned firms who otherwise meet the minimum requirements set forth in this Request for Proposal are encouraged to submit a Notice of Intent to Bid. In addition, Brand USA also seeks to do business with firms that also recognize the value of diversity and inclusion in the composition of their workforce and in their own contracting, subcontracting or teaming activities. We encourage such firms who meet the minimum bidding requirements (regardless of size or ownership) to also submit a Notice of Intent to Bid. Brand USA reserves the right to give weight or allocate bidding credit to diverse firms or those with a demonstrated commitment to inclusion as part of its evaluation process.

## WHY DOES A COUNTRY AS POPULAR AS THE USA NEED A MARKETING PROGRAM?

Although the United States remains one of the world's most popular travel destinations, during the first decade of this century, while the global travel market was booming, the USA's share of international travelers



## Request for Proposal

declined 37 percent—from 17.2 percent in 2000 to 12.4 percent in 2010. The resulting impact on the U.S. economy was an annual loss of 467,000 jobs and \$606 billion in lost revenue. In addition to being seen as unwelcoming (resulting from increased security measures that came following 9/11) and too familiar, the United States was also one of the world's only industrialized nations without a national tourism board to attract international travelers to its shores in order to fuel the nation's economy by inspiring the world to visit the U.S.A.—to see it again, or for the first time.

With the strength of a national marketing effort from Brand USA now in place, the United States is working to regain its share of the global travel market. By welcoming more international visitors to the USA, Brand USA is supporting U.S. economic growth, helping to spur job creation, and creating a more positive impression of the United States around the world.

### WHY IS INTERNATIONAL VISITATION SO IMPORTANT TO THE NATION'S ECONOMY?

#### International visitation helps local communities.

On average, overseas visitors spend nearly \$4,500 per trip and generate tax revenue in communities across the USA without burdening local services, such as public schools and fire departments. When international travelers spend this kind of money in our communities, it lessens the tax burden on U.S. citizens.

#### International visitation supports American jobs and economic growth.

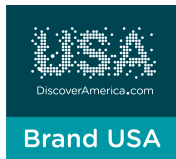
When international visitors come to the USA, the money they spend directly supports more than 1 million American jobs and adds \$181 billion to the U.S. economy. (Source: US Travel Association and NTTO 2013 Data)

#### International visitation enhances the image of the United States worldwide.

Surveys show that international visitors to the United States are 74 percent more likely to have a favorable view of America and 61 percent more likely to support U.S. policies.

#### Who Pays for It?

International visitors and private contributions fund the work of Brand USA—with half of Brand USA's budget generated by contributions from the private sector and matching funds provided by a \$10 fee paid by travelers from markets that are not required to have a visa to enter the United States. These markets are designated as visa-waiver countries. As a result, U.S. taxpayers contribute \$0 toward Brand USA's marketing



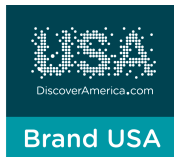
## Request for Proposal

efforts.

### **BRAND USA IS BUILDING ON SUCCESS**

Brand USA is delivering on a dynamic marketing strategy that includes, but is not limited to, a global advertising campaign, earned media and public relations strategies, a robust social media outreach plan, promotional and incentive campaigns, trade shows and sales missions, and educational campaigns about U.S. entry policies. Brand USA carefully selects its marketing tools and target markets and travelers after vigorous analysis of existing and original market research.

In 2013, Brand USA was fully deployed (consumer, co-op, and trade marketing) in eight markets (Australia, Brazil, Canada, Germany, Mexico, Japan, South Korea, and the United Kingdom)—and delivered a 47:1 return on marketing investment, 1.1 million incremental visitors, \$3.4 billion in direct travel spending, and \$7.4 billion total spending—which supported 53,000 new jobs. In 2014, Brand USA expanded the consumer campaign to China and Taiwan, and in 2015 will be fully deployed in 14 international markets (Australia, Brazil, Canada, Chile, China, France, Germany, India, Japan, South Korea, Mexico, New Zealand, Taiwan, and the United Kingdom). Every 1 percent increase in travel from these markets fuels the nation's economy by generating 500,000 additional visitors and \$1 billion in international visitor spend per year.



# Request for Proposal

## PURPOSE

The purpose of this Request for Proposal (RFP) is to select an enterprise customer relationship management (CRM) software provider that will enable Brand USA to manage and track its activities with partners and stakeholders more effectively. In addition to common CRM functionality, the successful bidder will demonstrate how its software can be configured to address Brand USA's operational complexities and automate processes and workflows in a user-friendly manner. Both consultancies that specialize in CRM implementation and CRM software providers are welcome to bid on this project.

## SCOPE OF WORK

As a public-private, non-profit organization, Brand USA generates its funding by raising cash and in-kind contributions from private sector companies, which are then matched 1:1 by funds collected from international visitors from visa waiver countries by the U.S. federal government. Brand USA utilizes its funds to engage in a large range of marketing activities, including business to consumer (B2C) and business to business (B2B) advertising, content production, trade shows and event sponsorship. A majority of these activities are cooperative executions with U.S. destinations and suppliers and in-market retailers and media. Therefore, the nature of Brand USA's operations requires a high degree of custom configuration to support non-standard services and methods of revenue generation.

The selected CRM software provider will:

- Provide a cloud-hosted (SaaS or PaaS) Customer Relationship Management Solution
- Collaborate with Brand USA staff to understand its operational complexities and configure CRM software to best fit Brand USA's non-standard operations
- Create and manage the project roadmap to meet or beat deadlines
- If necessary, port data from its existing CRM system (Base)
- Build, facilitate or apply existing interfaces with other Brand USA systems as specified in the subsequent Requirements section
- Implement and train Brand USA staff on the software and processes
- Provide ongoing maintenance and support



# Request for Proposal

## Requirements

### Functionality

- Revenue generation process flow management - Ability to track contribution activities (emails, notes from calls), generate and store contract versions and addendums, receive alerts upon status changes
- Procurement and insertion order work flow management - Includes form creation, approvals and pushing data to Brand USA's Financial Management System (FMS), pulling/receiving data from FMS to provide up-to-date status
- Storage of contact database of partners, program participants, event attendees, and vendors. Have ability to store relevant files (Microsoft Word, Excel, pdf, ppt, jpeg, gif, eps), add notes, designate roles, organization hierarchy and view history
- Sophisticated permissions management - enabling detailed controls for user access and edit capabilities
- Email integration with customizable parameters for user groups
- Program management - storage of program description, benefits, value, form creation, approvals and participation
- Display of departmental data stored in FMS via automated interface - providing access to invoice status, payment amounts, forecasts and budgets
- Ability to search contacts using a wide range of fields (city, company name, program, partnership status)
- Custom design template capability for the creation of newsletters or email communications
- Media campaign management. Includes form creation (scope of work), campaign calendars, campaign details (markets, channels, partners, spend), storage of campaign performance metrics
- Full access to system via mobile device. Supported Mobile Devices: At minimum - iPhone 4, 4s, 5, 5c, 5s, 6, 6s, iPad 2, 3, 4, 5; Google Nexus 9, 5, 4; Samsung Galaxy S5, S4, S3; Samsung Galaxy Tablet 4.7
- Fast search capability
- Supported Browsers: Current and previous version of Chrome, Firefox, Safari, Internet Explorer

### Outputs

- Standard dashboards auto generated on a weekly and monthly basis
- Custom reporting utilizing any combination of fields

## Request for Proposal

- Custom reporting utilizing basic calculations (e.g., average time between opportunity creation and close)
- Ability to export reports into Microsoft Excel
- Generate contact lists defined by any combination of fields
- Reports integrating externally sourced data (from FMS) with system data (revenue performance against goals, payment status, etc.)
- Calendar reports showing activity by any combination of fields
- Workflow summaries - view by status (need signature, approved, paid, etc.)

### Interfaces/APIs

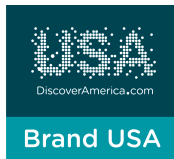
- Financial Management System (Microsoft Dynamics GP)
- Email (Microsoft Outlook 365)
- Brand USA's corporate website ([www.TheBrandUSA.com](http://www.TheBrandUSA.com) which is built on Drupal)
- Digital Asset Management system (MediaValet)
- Email list management system (Mailchimp)
- File Storage System (Box)

### Additional desired capabilities

- Security Assertion Markup Language (SAML 2.0) compatible for use with OneLogin (Single Sign On (SSO) solution)
- Bulk upload of external information (event location, timing, attendees, etc.)
- Plug in tools such as currency converters, calculators, calendars, translators
- Pulling/receiving data from external data vendors or sources, such as Google Analytics
- Social reporting tool integration (Crimson Hexagon)

## QUALIFICATIONS

- Minimum of five years of operations
- Experience with clients that have global operations
- Track record of delivering solutions for a range of business functions, including business



## Request for Proposal

development, sales, public relations, and marketing

- Strong references from large consumer brands currently utilizing your services

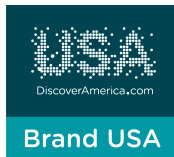
### PROPOSAL FORMAT AND SPECS

At minimum, proposals must include:

- Background information on your company including your current position in the marketplace and points of differentiation from other providers
- Description of your approach to customizing your solution to fit the needs of unusual organizations, including case studies if possible
- Project plan outlining key milestones and timing

In addition, it is recommended that the proposals also include:

- Case studies (minimum of two) with demonstrated results relevant to Brand USA (industry, or scale similarity)
- Illustration of how we will interact for planning, development, execution and optimization
- Unique selling proposition over competitors
- Answers to the following questions:
  - How do you work with third party APIs to best integrate?
  - How do you meet custom requirements?
  - What is your process for making user experience (UX) improvements?
  - What is your maintenance schedule?
  - What are your typical support response times?
  - What are your hourly rates for development beyond the original master services agreement?
  - What is your hosting environment?



# Request for Proposal

## BUDGET

Bidders must submit an appropriate and realistic budget, outlining the proposed cost of the goods and/or services for each of the activities/products proposed in response to this RFP. The budget must include costs for discovery, configuration, data port from former system (Base), hosting, any connection/API costs, licensing, ongoing maintenance, any consulting and support fees.

For budgeting purposes, please assume the following:

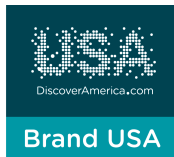
- 75 seats/client licenses
- 5000 contacts
- 15 types of relationships/products

## MINIMUM REQUIREMENTS

Proposals must address each item listed, giving specific details of techniques to be used in achieving these requirements. Proposals may be rejected if minimum requirements are not met. All proposers wishing clarification of this RFP must submit questions in writing to Brand USA, no later than October 7, 2015 (due by 5:00 pm, EDT), and sent by email to [rfpadmin@thebrandusa.com](mailto:rfpadmin@thebrandusa.com).

Costs for developing proposals are entirely the responsibility of the proposer and shall not be reimbursed by Brand USA.

1. Notice of Intent to Bid (Attachment 1) must be received by October 15, 2015 (due by 5:00 p.m. EDT). The notice shall be sent by email to [rfpadmin@thebrandusa.com](mailto:rfpadmin@thebrandusa.com) at the Brand USA office. The NOTICE OF INTENT TO BID, is nonbinding; however, it ensures the receipt of all addenda related to this RFP. Proposals will be accepted only from applicants who submitted a timely NOTICE OF INTENT TO BID.
2. RFP Responses must contain the following information:
  - a. Executive Summary.
  - b. Services and Activities: Provide description of the nature of the organization's services and activities. Note when the business was established, brief history and location. List the location(s) of the office(s) from which the primary work on this contract would be performed.
  - c. At least four examples of work.



## Request for Proposal

- d. No Conflict of Interest: Client relationships that could potentially be considered a conflict of interest must be listed.
- e. Contract Manager/Team: Identify one individual on the proposer's account team who will manage the contract work. Identify the role of each member who will service the account. Current resumes must be attached for each person who would in any way be associated with this account.
3. References: Provide at least three references.
4. Budget
5. Timeline and/or Project Plan
6. Certification Form (Attachment 2) must be signed and accompany all RFP Response submission.

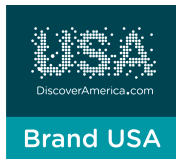
### TENTATIVE SCHEDULE

This tentative schedule may be altered at any time at the discretion of Brand USA. Brand USA reserves the right to reject any and all proposals, or any part thereof; waive an informality in the proposals and accept the proposal that best meets the needs of Brand USA.

|   |                    |
|---|--------------------|
| A. Proposal Released  | September 30, 2015 |
| B. Written Questions (due by 5:00 p.m. EDT)                   | October 7, 2015    |
| C. Written Questions Answered and posted to Brand USA Website | October 12, 2015   |
| D. Notice of Intent To Bid Due (due by 5:00 p.m. EDT)         | October 15, 2015   |
| E. Proposal Due (due by 3:00 p.m. EDT)                        | October 19, 2015   |
| F. Proposal Evaluation by Scoring Committee                   | October 26, 2015   |
| G. Notification and Scheduling of Finalist Interviews         | October 30, 2015   |
| H. Finalist Presentation/Interviews                           | November 9, 2015   |
| I. Notice of Intent to Award Contract and Public Posting      | November 16, 2015  |

### DELIVERY OF PROPOSAL

Each bidder is required to deliver a .pdf of its proposal to Brand USA's RFP Admin no later than October 19, 2015 (3:00 p.m. EDT). The .pdf should be no more than three separate files. The proposal may not exceed

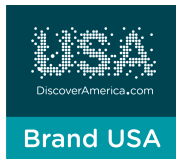


## Request for Proposal

thirty pages double-spaced at 12-point font. Ten printed copies of the proposal must be delivered October 19, 2015 to Brand USA at 1725 I St NW, Suite 800, Washington, DC 20006.

### **EVALUATION AND CONTRACTING**

All proposals satisfying the requirements of this Request for Proposals will be evaluated to establish which of the providers best fulfills the needs of Brand USA and this project. This Request for Proposals in no way commits Brand USA to award a contract, to pay any costs in preparation of a proposal, or to contract for the goods and/or services offered. Brand USA reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with all qualified providers or to cancel this Request for Proposals. After awarding the contract, the schedule will include a period of collaboration between Brand USA and the selected Contractor to better define, elaborate upon, and fix the Contractor's final Scope of Work and general Terms and Conditions.



## Request for Proposal

### ATTACHMENT 1

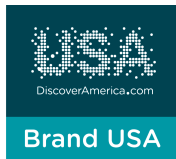
#### NOTICE OF INTENT TO BID

**Due: 5 PM EDT on October 15, 2015**

**SEND TO:**

Brand USA Headquarters  
C/O RFP Administrator  
1725 Eye Street NW, Suite 800  
Washington, D.C. 20006  
ATTN: RFP Customer Relationship Management System  
Phone: 202.536.2060  
Email: [rfpadmin@thebrandusa.com](mailto:rfpadmin@thebrandusa.com)

|                           |
|---------------------------|
| NAME OF BIDDER / COMPANY: |
| CONTACT PERSON:           |
| MAILING ADDRESS:          |
| TELEPHONE:                |
| FAX:                      |
| E-MAIL ADDRESS:           |
| SIGNED:                   |



# Request for Proposal

## ATTACHMENT 2

### CERTIFICATION

Please include this statement as part of the Proposal

#### Certification Statement

By submission of this proposal and authorized signature below, Proposer certifies that the undersigned corporate officer has authority to bind the bidder to the terms of this Proposal and hereby certifies on behalf of the bidder that:

- He/she has read and understands all commitments and terms of this Proposal.
- The information contained in this Proposal is accurate.
- Proposer's quote is valid for at least 120 days from the date of proposal's signature below.
- Proposer understands that if selected as the successful Proposer, he/she will have ten (10) business days in which to complete contract negotiations, if any, and execute the final contract document. Date of execution can be extended by mutual agreement of contractor / Brand USA.

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Typed or Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

#### Official Contact

Brand USA requests that the Proposer designate one person to receive all communications for clarification and verification of information related to this proposal. Please identify this point of contact below:

\_\_\_\_\_  
Official Contact Name

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Official Contact Title

\_\_\_\_\_  
Facsimile Number

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Street, City, State, Zip



## Request for Proposal

### ATTACHMENT 3

#### FOR BRAND USA USE ONLY

Bid/Proposal: \_\_\_\_\_

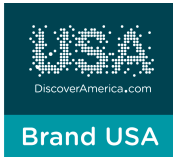
Evaluated By: \_\_\_\_\_

Date: \_\_\_\_\_

#### Proposal Evaluation Criteria

The evaluation committee will judge each written proposal based on the following criteria:

| EVALUATION CRITERIA  | MAX.<br>POINTS | SCORE |
|--|----------------|-------|
| 1. Ability to adapt and configure tool to fit Brand USA's core CRM needs       | 35             |       |
| 2. Intuitive user experience   | 25             |       |
| 3. Ability to adapt and configure tool to fit additional desired functionality | 15             |       |
| 4. Training and support  | 15             |       |
| 5. Cost  | 10             |       |
| <b>TOTAL POINTS</b>  | <b>100</b>     |       |



## Request for Proposal

### ATTACHMENT 4 – IF NECESSARY

#### FOR BRAND USA USE ONLY

#### ORAL INTERVIEW / DEMONSTRATION CRITERIA

The evaluation committee may, if it deems necessary, select certain proposers for oral interviews and/or demonstrations. Interviews/demonstrations apply only to the top finalist(s), as determined by the evaluation committee. The oral interviews/demonstrations will allow finalists to demonstrate their understanding of the project objectives and to articulate their capability to meet or exceed the requirements of this RFP.

The evaluation committee reserves the option of conducting the oral interviews/demonstrations via teleconference, at the Brand USA office, at the finalist's and/or the proposed subcontractor's site, or other designated site.

The evaluation committee reserves the right to designate one or more members of the committee to perform the oral interviews/ demonstrations, if needed, so that grading of oral interviews/demonstrations may be done by fewer than the entire committee.

If interviews/demonstrations are not required, the maximum number of points is 100. If interviews/demonstrations are deemed necessary, the maximum number of points is 150.

If a finalist cannot meet on the designated interview/demonstration date, the evaluation committee reserves the right to disqualify the finalist as non-responsive.

The following criteria will be used for scoring the oral interview/demonstration:

| ORAL INTERVIEW/DEMONSTRATION CRITERIA                         | MAX.      | SCORE |
|---|-----------|-------|
| 1. Overall fit of proposed solution to Brand USA requirements | 25        |       |
| 2. Ease of configuration and use of proposed solution         | 10        |       |
| 3. Implementation methodology and tentative project plan      | 10        |       |
| 4. Resources required   | 5         |       |
| <b>TOTAL POINTS</b>   | <b>50</b> |       |