



Brand USA RFP for Customer Relationship Management System Questions & Answers

Q: Would Brand USA be open to an onsite scoping session prior to finalizing contract at no cost to Brand USA?

A: Yes.

Q: Does Brand USA have an internal IT team and if so what is the structure?

A: Brand USA has a Manager, Information Technology who reports to the VP, Operations.

Q: Can Brand USA provide guidance on the amounts and types of data currently stored in Base, and what portions of those will be Migrated to the new CRM?

A: Currently, Base contains:

- 2,164 Contacts
- 800 Deals (including 649 CLOSED deals)
- An export of the entire Base CRM data base consists of 5 Microsoft Excel CSV files with a total size of 1.85MB
- It is assumed that all contacts, deals and notes will be migrated to the CRM system

Q: Does Brand USA envision partners or other outside entities having direct web access (portal) to the CRM system? If so, can you provide example use cases?

A: Brand USA marketing services providers would ideally access/input certain types of data (managed by permissions) in the CRM system. For example, a firm who creates and manages our trade show pavilions (which contain booth space for partners) should be able to input which partners are participating, the cost of the space and additional relevant details.

Q: Does Brand USA have a timeline of when they would like the new system to be “live”?

A: While Brand USA is somewhat flexible in timing, it is expected that the system is ready for implementation in March 2016.