Community Power Customer Relationship Management ("CRM")
Request for Proposals ("RFP") #25-005 Responses to Proposer Questions
Posted: June 24, 2025

I.   Project Scope, Strategic Vision, & Platform Considerations

1.   It's a little unclear as to whether this CRM will replace Calpine's CRM. We didn't see any use cases for CSRs while taking calls, or for Billing Representatives to process exceptions, for instance. Is this a replacement of Calpine's CRM?

Response to Question #01: As noted in the RFP, specifically under the background and introduction section (RFP Page 2, Paragraph 3 through 5), Community Power's incumbent Contact Center and Data Management vendor (Calpine) currently manages all aspects pertaining to CRM functions on behalf of Community Power including Contact Center CSR call interactions with customers and emails via MS Dynamics 365 CRM, and through this RFP Community Power is seeking to bring CRM functions in-house. Please note that Community Power expects that its enterprise-wide CRM platform implemented as part of the services sought in this RFP will be robustly integrated with the Contact Center and Data Management functions including the MS 365 Dynamics CRM currently handled by Calpine Community Energy along with all the other use cases that are captured on the RFP's **Attachment A**.

2.   If this is not a replacement of Calpine's CRM, will you still use both? We are trying to understand how much of the data and functionality has to be rebuilt in the new CRM. Or is the data needed high level account, billing and usage information, and the main use cases are around programs, account management and marketing?

Response to Question #02: Please see the response to Question #01.

3.   Will the new CRM completely replace Dynamics 365, or is it expected to integrate with and extend the current system?

Response to Question #03: Community Power expects that its enterprise-wide CRM platform implemented as part of the services sought in this RFP will be robustly integrated with the Contact Center and Data Management functions including the MS 365 Dynamics CRM instance currently hosted and supported by Calpine Community Energy along with all the other use cases that are captured on the RFP's **Attachment A**.

4.   We would like to confirm whether Community Power would be open to considering a cloud-based CRM solution such as HubSpot, which operates under a Software-as-a-Service (SaaS) model. While such platforms are subscription-based and not owned outright, they can be customized extensively to meet enterprise-level needs, including secure data handling, stakeholder engagement tracking, marketing workflows, intake forms, and API integrations.

Response to Question #04: Yes, Community Power is open to considering cloud-based CRM solutions, including those delivered under a Software-as-a-Service ("SaaS") model, such as HubSpot. However, any proposed solution must meet the requirements outlined in the RFP. Proposers should clearly demonstrate

how their SaaS-based solution can be configured to meet these requirements and provide a roadmap for long-term operability and data portability.

5. Would a SaaS-based solution like HubSpot be acceptable if it can be configured to meet the functional requirements outlined in Attachment A and ensure long-term operability and access for Community Power?

Response to Question #05: See response to Question #4.

6. Do you see your CRM evolving significantly over the next 1–3 years?

Response to Question #06: Community Power anticipates that the CRM will evolve significantly over the next 1–3 years. As outlined in the RFP (Page 2, Paragraph 2), the organization is seeking a scalable, enterprise-wide CRM platform that can grow with its operational needs and support long-term ownership and independence. Proposers should provide solutions that are not only robust at launch but also flexible and extensible.

7. How much flexibility do you need, or would like to have, in tailoring the CRM to your business workflows?

Response to Question #07: Community Power requires a high degree of flexibility in tailoring its enterprise-wide CRM platform implemented as part of the services sought in this RFP to meet the needs of multiple departments, including Customer Operations, Programs, Public Affairs, and its energy efficiency portfolio of programs under the San Diego Regional Energy Network ("SDREN"). The enterprise-wide CRM must support configurable workflows, user roles, data segmentation, and integration with external systems. The RFP emphasizes the need for a customizable, scalable, and independently managed platform that can evolve with the organization's needs. Please review RFP, Page 2, Bullet 3, **Attachment A** – Scope of Services (Section D), & **Attachment A** – Functional Requirements, Pages 4–7 for more information.

8. How important is it that your CRM platform supports reusable components or modular apps?

Response to Question #08: Vendors are encouraged to propose solutions that support modular design principles and demonstrate how reusable components can be leveraged to streamline implementation and future enhancements. Regardless of any proposed reusable components or modular apps, any such CRM solution must meet the requirements of the RFP.

9. How important is it for your CRM to be tightly embedded within your productivity suite (e.g., Word, Excel, Outlook)?

Response to Question #09: Given that many departments at Community Power rely on Microsoft 365 tools, vendors are encouraged to highlight how their CRM solution can integrate with these platforms to support day-to-day operations for end users. Additionally, any such CRM solution must meet the requirements of the RFP.

10. Are there other vendors (e.g., CCDM, DERMS providers) we will need to coordinate with directly?

Response to Question #10: Yes, the Selected Proposer should anticipate coordination with several external parties during the CRM implementation. These may include, but are not limited to:

- Contact Center Data Management ("CCDM"): Calpine is the current provider of Community Power's Contact Center and Data Management services, including hosting and support for the existing Microsoft Dynamics 365 CRM instance. Coordination will be necessary for data migration, integration, and transition planning.
- Distributed Energy Resource Management System ("DERMS"): Integration with Community Power's DERMS is a key requirement. Coordination may be needed to establish data pipelines and ensure compatibility with CRM workflows.
- San Diego Gas & Electric (SDG&E): As the utility providing customer data and EDI feeds, SDG&E may be involved in data exchange processes.
- Other Platform Vendors: Including providers of the Enterprise Data Platform ("EDP"), Granicus GovDelivery, and any additional systems identified during discovery.

Proposers should outline their approach to vendor coordination, including any assumptions, dependencies, or facilitation support needed from Community Power.

11. Do you require post-launch support and staff training beyond go-live? If so, for how long?

Response to Question #11: Yes, Community Power requires post-launch support and staff training beyond go-live. For a bid response, include a) three (3) one-hour end user training sessions; b) two (2) systems user training sessions; and c) two (2) backend systems engineering training sessions, all in-person. While the exact duration of post-launch support will be finalized during contract negotiations, vendors should propose a support and training plan that ensures a smooth transition to internal ownership and long-term sustainability.

12. Are there any specific business processes or workflows (e.g., approval chains, escalations, case routing) that must be automated within the CRM system?

Response to Question #12: Yes, Community Power expects the enterprise-wide CRM to support automation of key business processes and workflows across multiple departments. These include, but are not limited to:

- Approval chains for program applications, incentive disbursements, and internal administrative processes (e.g., SDREN program approvals, incentive release workflows)
- Escalation paths for customer service issues, program exceptions, or data discrepancies
- Case routing and tracking for customer inquiries, support tickets, and stakeholder interactions
- Multi-stage program workflows for application intake, eligibility verification, document collection, and milestone-based approvals
- Automated notifications and task assignments based on workflow triggers or status changes

The CRM must be configurable to accommodate these workflows and allow for future modifications as Community Power's operational needs evolve. Proposers should describe how their solution supports workflow automation, including tools for visual workflow design, rule-based logic, and integration with external systems

13. As part of the enterprise-wide CRM initiative, are we aiming to develop a single unified CRM solution that will serve both Community Power and SDREN users, thereby, effectively replacing CCDM vendor MS 365 Dynamics CRM? Or is the intent to build a new CRM specifically for SDREN customers, while integrating the existing CCDM CRM offering used by Community Power?

Response to Question #13: Please see the response to Question #01.

14. Beyond the current CRM data sources that are already getting ingested into the existing EDP platform, are there any additional data silos or CRM systems that we should consider ingesting to support the future-state CRM platform?

Response to Question #14: As part of the future-state CRM platform, vendors should be prepared to assess and potentially integrate additional data silos or systems. Proposers are encouraged to include discovery and data mapping activities in their implementation approach to identify and validate all relevant data sources that should be integrated into the CRM to support a comprehensive 360-degree view of customers and stakeholders.

15. What are the differences between SDCP CRM and SDREN systems/instances in terms of requirements related to data, process, reporting, etc.?

Response to Question #15: The primary differences between the Community Power (SDCP) and SDREN CRM systems/instances relate to their data governance, operational scope, user access, and reporting needs. The enterprise-wide CRM solution must be configured to accommodate the unique requirements of SDREN operations, including a stand-alone instance that ensures data segregation between SDREN and Community Power customer data for privacy compliance. This is necessary because SDREN serves customers across San Diego County, including those outside Community Power's jurisdiction. Please note that there will still be a need for an ongoing integration between the segregated SDREN instance of the CRM to the CCDM 365 CRM Dynamics currently hosted and supported by Community Power's CCDM vendor specific to just the Community Power customers. These differences necessitate a CRM platform that is both unified and flexible, capable of supporting distinct configurations and user experiences within a shared infrastructure.

II. **Budget, Pricing & Procurement**

16. Is there a budget in the RFP?

Response to Question #16: Community Power has not published a specific budget for this project in the RFP. Proposers are expected to submit a comprehensive cost proposal that includes all anticipated expenses, such as licensing, infrastructure, implementation, support, and training. The proposed budget should reflect the scope of services outlined in the RFP and account for all the RFP's use cases, as applicable.

17. Do you intend to pay for the architecture separately, or is that cost expected to come out of this project's budget? For instance, would you pay for a Salesforce production and development environments, licenses, storage—and we would build your solution on this infrastructure? Or are you expecting us to purchase infrastructure for you out of the budget?

Response to Question #17: Vendors are expected to include all infrastructure-related costs as part of their proposed project budget. This includes any necessary licensing, development and production environments, cloud storage, and platform-specific fees (e.g., Salesforce environments, if applicable). Community Power does not intend to pay for architecture or infrastructure separately from the overall project budget.

Proposals should reflect a complete, customized solution that accounts for all components required to implement and operate the CRM platform as it relates to the use cases articulated in the RFP's **Attachment A**.

18. The SOW is hard to price since we could provide a minimum viable product or a fully customized solution. Would it be appropriate to provide hourly rates or are you looking for a firm price?

Response to Question #18: Community Power understands that the scope of work could be approached in multiple ways. Proposers may submit either a firm fixed price or an hourly rate structure, provided that the pricing model is clearly explained and includes:

- A detailed breakdown of tasks and deliverables
- Estimated hours per task or phase
- Hourly or blended rates by role
- A total not-to-exceed cost for the full project

If proposing a phased or modular approach, please clearly delineate the scope, pricing, and timeline for each phase. This will help Community Power evaluate the value and scalability of your proposed solution.

19. Will Community Power provide the cloud infrastructure (e.g., Azure, AWS), or should the vendor propose and manage hosting?

Response to Question #19: Proposers are expected to propose and manage the cloud infrastructure as part of their overall solution. Community Power will not be providing separate hosting environments (e.g., Azure, AWS). The proposed CRM platform must be cloud-based and include all necessary infrastructure components—such as development, testing, and production environments—within the scope of the Proposer's submission.

The solution must also support a transition plan that enables Community Power to assume full ownership and control of the platform post-deployment, without ongoing reliance on the vendor for hosting or licensing.

20. After go-live, will Community Power own all licensing and hosting responsibilities directly?

Response to Question #20: Yes, as stipulated in the RFP it is expected that the enterprise-wide CRM solution will be built for and owned by Community Power, enabling the organization to manage and operate it independently. After the contracted support period, Community Power must retain full control of the platform with no reliance on the contractor for ongoing licensing and support costs**.**

III. Architecture, Hosting & Environment Segmentation

21. As a corollary to the above question, would we need to build a data lake for you or would we need to develop an API (or other connection) to a data lake that you develop and maintain?

Response to Question #21: As noted in the background and introduction section of the RFP (Page 2, Paragraph 2 through 5), the services sought after are specific to Community Power seeking proposals from qualified individuals or firms to provide not only Systems Integration ("SI") services but also to support the development and deployment of an organization-wide Customer Relationship Management ("CRM") platform. This platform should address multiple use cases across different functional areas within the organization, as outlined in the RFP's **Attachment A**. Nowhere in this RFP is there a requirement to build a data lake. However, it should be noted that Community Power expects that its enterprise-wide CRM platform implemented as part of the services sought in this RFP will need to be robustly integrated with the Contact Center and Data Management functions including the MS 365 Dynamics CRM currently handled by Calpine Community Energy along with all the other use cases that are captured in the RFP's **Attachment A**.

22. Is the expectation that Community Power and SDREN will share the same CRM configuration (with separate databases), or will unique workflows and business logic need to be configured for each?

Response to Question #22: Please see the response to Question #15.

23. Are there any shared reporting or integration requirements between the SDREN and Community Power environments that we should consider in platform design?

Response to Question #23: Please see the response to Question #15.

24. Will there be separate environments required (e.g., dev, test, production)?

Response to Question #24: Consistent with best practices for cloud-based platform and technology development, separate dev, test and production environments for the enterprise-wide CRM solution are highly recommended.

25. Do you anticipate federated identity across multiple agencies or departments (e.g., SDREN, SDG&E and CCDM) requiring delegated access control within the same CRM instance?

Response to Question #25: While federated identity is not explicitly required, the CRM solution must support robust delegated access control and secure, segmented access for multiple internal and external

stakeholders. This includes data segregation between SDREN and Community Power, and role-based access for vendors, contractors, and staff. The architecture should be flexible enough to accommodate federated identity models if needed in the future.

26. Do you expect - identity federation or SSO be used (e.g., Azure AD, AWS IAM Identity centre, Okta)?

Response to Question #26: While the RFP does not explicitly require identity federation or single sign-on (SSO), the CRM solution must support secure, role-based access for multiple internal and external stakeholders. Proposers are encouraged to design the system with flexibility to integrate with identity providers such as Azure AD, AWS IAM Identity Center, or Okta to support future SSO or federated identity as needed.

27. Should the CRM integrate with an existing Master Data Management (MDM) solution for customer, location, partner data, or asset data governance?

Response to Question #27: Please see response to Question #10.

### IV.	Integration & Data Management

28. What third party integrations are required, outside of with Calpine?

Response to Question #28: Please see response to Question #10.

29. What SLAs and security controls are mandatory for integrations (e.g., daily EDI refreshes, real-time DERMS events, MFA, field-level encryption)?

Response to Question #29: As noted in the RFP, the CCDM vendor-hosted and -supported Microsoft Dynamics 365 CRM is refreshed daily to capture all customer interactions through the Contact Center, including those via IVR, Customer Service Representative-handled calls and email correspondences received as well as the daily EDI feeds for active customer accounts. There is also a weekly refresh done by the CCDM vendor pertinent to SDG&E metadata for Community Power's eligible customers. Community Power therefore expects that the CRM solution sought in this RFP must integrate with the Contact Center and Data Management functions described above in a similar cadence so as to provide a comprehensive 360-degree view of its customers and stakeholders. The CRM solution must also support the needs and use cases of all functional areas, including Public Affairs, Programs and SDREN teams, as outlined in the RFP's **Attachment A**.

30. Can it be assumed that all external services to be integrated (e.g., Contact Center and Data Management functions) will offer RESTful endpoints?

Response to Question #30: While Community Power encourages the use of modern, standards-based integration methods such as RESTful APIs, it cannot guarantee that all external systems—particularly those managed by third-party vendors—will expose RESTful endpoints. Proposers should design their solutions with flexibility in mind and be prepared to accommodate a variety of integration methods, including but

not limited to RESTful APIs, SOAP, direct database access, file-based exchanges, or other secure data transfer mechanisms.

Community Power expects the selected Proposer to work collaboratively with the incumbent CCDM vendor to determine the most effective and secure integration approach based on the capabilities of the existing systems. Proposers should outline in their response how they will approach integration discovery, interface negotiation, and contingency planning in the event that RESTful endpoints are not available.

31. What APIs or integration methods are available from the DERMS platform?

Response to Question #31: The Proposer should plan a discovery phase to identify the needs of the external contractors to the CRM.

32. What is the expected frequency and format of data syncs from SDG&E and CCDM (daily, weekly, real-time)?

Response to Question #32: Please see the response to Question #29.

33. Will integration be required with Granicus GovDelivery and/or the future Enterprise Data Platform (EDP)?

Response to Question #33: Yes, use cases specific to SDREN in the RFP, (Page 22 under the RFP's **Attachment A**) articulate the need for the CRM solution to integrate with Granicus GovDelivery and Community Power's EDP.

34. Do you need data like meter location, and if so do you mean maintain a meter number in the database or something more sophisticated like grid telemetry?

Response to Question #34: Per the RFP's **Attachment A** of the RFP, (Page 18) customer contact information – includes name, account number, meter number, phone number, email address, mailing address etc., and points of contact should be hosted for ease of communication with the customer. Instances of manually added contact details should not be over-written by regular syncs from the utility data.

35. Do you anticipate that analytical tools need to be incorporated?

Response to Question #35: Yes. Currently, the CCDM hosted and supported MS Dynamics 365 CRM incorporates PowerBI for various reports and dashboards for Community Power staff and Calpine to utilize in serving customers. Community Power expects similar analytical tools to be incorporated within the enterprise-wide CRM solution.

36. Does customer energy usage need to be incorporated and if so at what level—monthly, hourly, sub-hourly?

Response to Question #36: Yes. Currently, the CCDM hosted and supported MS Dynamics 365 CRM incorporates customers' monthly usage in addition to customer payment information etc. Community Power expects similar monthly customer usage at the bare minimum to be incorporated within the enterprise-wide CRM solution.

37. The documentation references Microsoft SQL Server. Can you confirm whether the CCDM CRM stores data in a relational database only, or are there any non-relational (i.e., NoSQL) database involved as well?

Response to Question #37: As articulated in the RFP, the CCDM makes specific data points emanating from their hosted and supported MS 365 Dynamics CRM available to Community Power staff through a dedicated CRM instance and designated Microsoft SQL Server Views, which staff can call on securely by querying directly or via API calls. Proposers should be prepared to accommodate semi-structured and unstructured data sources, such as documents, dill PDF files, and other sources.

38. Are there any existing health and data quality efforts or initiatives that we should align with as part of the CRM platform buildout?

Response to Question #38: Consistent with best business practices as it pertains to customer data, there are always going to be efforts by Community Power, SDG&E, Calpine, regulatory bodies etc. to enrich and enhance data quality and vendors are highly encouraged to propose a CRM solution that is flexible and scalable.

39. We assume data for CCDM/Calpine CRM for Community Power would be made available in flat file format? Are there any semi-structured/unstructured data sources to consider such as documents /Images etc?

Response to Question #39: Community Power anticipates that data from the incumbent CCDM/Calpine CRM system may be made available in a variety of formats, including but not limited to flat files, SQL Server Views, and API-based access, depending on the nature of the data and the integration approach agreed upon with the incumbent vendor.

In addition to structured data, Proposers should be prepared to accommodate semi-structured and unstructured data sources.

40. Is the CCDM MS Dynamics 365 CRM API enabled, allowing external systems to interact with its functionalities?

Response to Question #40: The incumbent CCDM-hosted Microsoft Dynamics 365 CRM currently provides access to specific data points through a dedicated CRM instance and designated Microsoft SQL Server Views, which Community Power staff can access securely via direct queries or API calls. This indicates that some level of API enablement is in place to support data access and integration.

However, the full extent of API functionality, particularly for interacting with business logic or writing data back to the system, may be subject to the CCDM vendor's configuration and access controls. Community Power cannot guarantee unrestricted API access to all Dynamics 365 functionalities.

41. Beyond standard dashboards and reports, are there other consumption layers expected in the future state such as APIs, data exchange requirements or integration with other platforms, both

internal integration and exposing CRM data to third-party applications (e.g. Granicus GovDelivery)?

Response to Question #41: Yes, Community Power anticipates that the future-state CRM platform will support multiple consumption layers beyond standard dashboards and reports.

Proposers should design a flexible architecture that supports secure data sharing, integration extensibility, and compliance with privacy and data governance requirements. The ability to expose and consume data via APIs, flat files, or other secure mechanisms will be essential to support evolving business needs.

42. What systems must the CRM integrate with (For Example: DERMS, billing, ERP, website, portals)?

Response to Question #42: Community Power anticipates that the enterprise-wide CRM platform will need to integrate with a variety of internal and external systems to support operational, programmatic, and customer service functions. These include but are not limited to: CCDM Systems, San Diego Gas & Electric (SDG&E), Distributed Energy Resource Management System (DERMS), Community Power's Website and Web Portals, Granicus GovDelivery, Community Power's EDP (future integration), Third-Party Implementer Systems, Visualization and Reporting Tools.

Proposers should propose a flexible, scalable integration architecture that supports secure data exchange through APIs, flat files, or other industry-standard methods. The final integration scope will be refined in collaboration with Community Power and its vendors during the implementation phase.

43. Do you require real-time integrations, or are batch syncs acceptable?

Response to Question #43: Community Power currently utilizes a combination of daily and weekly batch data syncs from key systems such as SDG&E and the incumbent CCDM-hosted CRM. While real-time integration is not a strict requirement, the future-state CRM platform should be designed to support flexible integration models. Proposers should assess the nature of each integration point and recommend the most appropriate synchronization method based on data criticality, system capabilities, and performance considerations. The architecture should be scalable and adaptable to support real-time integrations in the future as business needs evolve.

44. What is the data source of MS SQL Server Views?

Response to Question #44: The Microsoft SQL Server Views referenced in the RFP are maintained by the incumbent CCDM vendor and are derived from the hosted Microsoft Dynamics 365 CRM instance. These views expose selected data points related to customer interactions, account information, and operational metrics. Access to these views is currently provided to Community Power staff for reporting and integration purposes. The selected proposer will be expected to work with the incumbent vendor to understand the best way to connect and integrate with the hosted Microsoft Dynamics 365 instance..

45. Are vendors, SDG&E the system of record? What data is static vs. dynamic as it pertains to the refresh?

Response to Question #45: SDG&E is the system of record for utility account details, including customer eligibility, meter, and usage data, and payment remittance. The CCDM vendor currently acts as the system of record for customer interactions, CRM data, and CCA billing transactions, and customer elections to different Community Power service levels.

Static data can include customer interactions, PDF bill uploads, past enrollment actions, and some premise and customer identifiers. Dynamic data includes customer elections such as rate, service option, program enrollments, and account details.

46. In addition to CCDM CRM, DERMS, EDP and Granicus, are there any other systems to be integrated with the new, in-house enterprise-wide CRM?

Response to Question #46: At this time, the primary systems identified for integration include the CCDM-hosted CRM, DERMS, Granicus GovDelivery, and the future Enterprise Data Platform (EDP). However, additional systems may be identified during the discovery phase, including third-party implementer platforms, customer-facing portals, and internal tools. Proposers should design an integration framework that is modular and extensible to accommodate future systems.

47. What data would the external contacts need from CRM?

Response to Question #47: The proposer should plan a discovery phase to identify the needs of the external contractors to the CRM. Please note that the needs and access provision to data from the enterprise-wide CRM solution for approved external contacts will be guided by Community Power's IT and Data Governance policies.

48. Does SDCP envision external users accessing CRM directly (with appropriate security controls and privileges) or a vendor-supplied portal that exposes data from CRM?

Response to Question #48: Community Power is open to either approach, depending on the security, usability, and cost-effectiveness of the solution. The CRM should support secure, role-based access for external users either through direct access with strict controls or via a vendor-supplied portal that interfaces with the CRM. The proposer should recommend the most appropriate model based on best practices and the use cases outlined in the RFP.

49. Please explain/expand on "data pipeline health and data quality".

Response to Question #49: Community Power expects the solution to include automated monitoring of data pipelines health and data quality. This refers to ensuring that data incoming, outgoing, and throughout the platform is monitored, so that any issues can be detected and addressed proactively. This is in reference to both data quality and availability/uptime.

50. Is SDCP referring to auditing when referencing "data tracking"?

Response to Question #50: Yes, in part. "Data tracking" includes auditing capabilities such as logging changes to records, tracking user activity, and maintaining data lineage. Additionally, Community Power is also interested in the ability to trace data from its source through transformation and usage within the CRM to support compliance, troubleshooting, and reporting

51. Is there an expectation of initial data cleansing only, or a scenario where ongoing data cleansing is necessary (i.e. Incoming data from external systems maybe inconsistent, for ex: CA, SoCal, California)?

Response to Question #51: Community Power expects that on-going data cleansing will be necessary and will vary by data source. Proposers are highly encouraged to factor this into their overall consideration as part of their RFP response.

52. Please explain required ETL/pipeline needs.

Response to Question #52: The CRM platform must support robust Extract, Transform, Load (ETL) pipelines to ingest data from multiple sources, including CCDM CRM, SDG&E, DERMS, and third-party implementers. These pipelines should support scheduled and on-demand refreshes, data transformation and validation, error handling, and logging. The architecture should be scalable, secure, and designed to accommodate future data sources and formats.

V.   Migration Strategy & Legacy System Transition

53. Would Community Power consider a tenant-to-tenant migration approach for Dynamics 365 CRM as a transition path, or is a clean-slate implementation preferred to ensure architectural clarity?

Response to Question #53: Community Power is seeking a clean-slate implementation of an enterprise-wide CRM platform that it will own, manage, and operate independently. While tenant-to-tenant migration may be considered for specific data elements, the overarching goal is to establish a new, scalable, and secure architecture that aligns with Community Power's long-term operational and data governance objectives.

54. What is the anticipated level of support or cooperation from the incumbent CCDM vendor (Calpine) in enabling access to existing CRM configurations, workflows, and data for migration?

Response to Question #54: Community Power expects to coordinate with the incumbent CCDM vendor to facilitate access to necessary data and configurations. However, the level of support may vary.

55. Will Community Power require legacy CRM data (beyond what is actively migrated) to be retained in any form — e.g., for sandbox access, audit, or side-by-side comparison?

Response to Question #55: Community Power expects to coordinate with the incumbent CCDM vendor to facilitate access to necessary data and configurations. However, the level of support may vary. Proposers

should describe in their approach some type of discovery or facilitation phase to assess access requirements and dependencies and propose strategies to mitigate potential limitations.

56. What version and licensing model of Microsoft Dynamics 365 is currently in use (cloud or on-prem)?

Response to Question #56: The incumbent CCDM vendor currently hosts and supports a cloud-based Microsoft Dynamics 365 CRM instance. Community Power does not directly manage the licensing or infrastructure for this system, as it is part of the vendor's managed services.

57. What level of access would we be expected to have to the existing tenant/D365 environments for analysis or data extraction?

Response to Question #57: Access to the existing Dynamics 365 environment is managed by the incumbent CCDM vendor. Community Power will facilitate coordination to support data extraction and analysis as needed, but proposers should anticipate that access may be limited to specific data views, exports, or API endpoints, subject to vendor cooperation and security protocols.

58. Is there any current connection between your CRM and ERP modules (if yes, which ERP and Modules)?

Response to Question #58: No: The ERP is not yet implemented. When an ERP system is introduced in the future, integration requirements will be evaluated at that time. Proposers should design the CRM architecture to be extensible and capable of integrating with ERP systems if needed.

59. We assume this Project will involve migration of the historical dataset and past event records into the new platform. What is the approximate size of historical data sets and how many tables /Data objects exist today?

Response to Question #59: The exact size and structure of the historical dataset are not specified in the RFP. Proposers should plan for a discovery phase to assess the volume, complexity, and relevance of historical data, including the number of tables and data objects. Migration should prioritize data that is operationally necessary, with options for archiving or referencing less critical historical records.

60. We assume there are existing data flow documentation or models that outline the current data flow, system architecture, or integrations for the CCDM MS Dynamics 365 CRM, including APIs and DB stores. Please confirm.

Response to Question #60: Community Power expects that some documentation exists but cannot guarantee its completeness or availability. Proposers should plan to conduct a discovery and assessment phase to map current data flows, integrations, and system architecture in collaboration with Community Power and the incumbent vendor.

61. What is the estimated total data size (in GB), including attachments, documents, and historical data?

Response to Question #61: The total data size, including attachments and historical records, is not specified in the RFP. Proposers should include a data assessment phase in their implementation plan to determine storage requirements and inform migration and archival strategies.

62. Approx how many records (contacts, leads, cases, programs) do you expect to migrate into the new CRM? What are the source systems?

Response to Question #62: The primary source system is the CCDM-hosted Microsoft Dynamics 365 CRM. While the exact number of records is not provided, the CRM supports approximately 960,000 customer accounts. Proposers should plan for a scalable migration approach that includes customer records, program participation data, and interaction history, with prioritization based on operational relevance.

VI.   Users, Access & Stakeholder Experience

63. Which success metrics (e.g., case resolution time, program enrollment rate, data pipeline health) will you track across departments?

Response to Question #63: Community Power anticipates tracking a range of success metrics aligned with departmental goals and CRM functionality. These may include, but are not limited to:

- Case resolution time and customer satisfaction (Customer Operations)
- Program enrollment rates and incentive disbursement timelines (Programs)
- Campaign engagement and outreach effectiveness (Public Affairs)
- Data pipeline health, data quality, and system uptime (IT/Admin)

64. How many named users actively access the existing CRM across business areas (e.g., Customer Service, Program Ops, Public Affairs)? Can you provide a rough breakdown by user roles (e.g., full users, reporting-only, external partners)?

Response to Question #64: The current CRM is accessed by a range of internal users across departments. While an exact breakdown cannot be provided at this time, Community Power anticipates approximately 50 internal business users with varying roles, including:

- Full users (e.g., program managers, analysts)
- Reporting-only users
- Administrative users
- External partners with limited, role-based access Proposers should plan for a scalable user model and confirm user counts during the discovery phase.

65. What external access modes do your contractors and partners require (e.g., web-form portals, mobile entry, offline access)?

Response to Question #65: External users such as third-party implementers and nonprofit partners may require access via:

- Secure web-based portals (e.g., for program applications and document uploads)
- Mobile-friendly interfaces
- Role-based dashboards Offline access is not a current requirement but may be considered for future enhancements. Proposers should recommend secure and user-friendly access modes based on use cases in the RFP's **Attachment A**.

66. Is Customer Insights currently being used? If so, for what specific purpose or department?

Response to Question #66: Proposers may suggest the use of such tools if they align with Community Power's goals for customer segmentation, engagement tracking, or analytics.

67. How many total users are anticipated — internal staff, third-party vendors, community orgs, SDREN users?

Response to Question #67: Please see the response to Question #64.

68. Will third-party implementers or nonprofit partners require login-based access with role-based permissions?

Response to Question #68: Yes. The CRM must support login-based access with role-based permissions for third-party implementers and nonprofit partners, ensuring data security and access control. This is especially important for SDREN program administration and incentive tracking.

69. Who are the primary internal user groups for the CRM. For Example: program managers, sales reps, customer service agents, analysts, IT/admins. Will external users like vendors, contractors, partners require access to any part of the CRM?

Response to Question #69: Please see the response to Question 64.

70. What is the estimated number of users for each role/persona? Will users access the system via desktop only, or is mobile CRM access required?

Response to Question #70: See Response to Question 64. Additionally, desktop access will be the primary mode, but mobile-friendly access is desirable for field-based users and external partners. Proposers should ensure responsive design and mobile compatibility.

71. How are leads or customer records currently captured (e.g., forms, manual entry, imports)?

Response to Question #71: Customer records are currently captured through:

- Web forms embedded on Community Power's website

- Contact Center interactions (IVR, email, phone)
- Data imports from SDG&E and CCDM systems
- Manual entry by staff.

The new CRM should support all these methods and improve automation and validation.

72. Could you describe the stages in your sales pipeline?

Response to Question #72: As a public agency, Community Power does not operate a traditional sales pipeline. Instead, the CRM will support:

- Customer enrollment and opt-out tracking
- Program application and approval workflows
- Incentive management and reporting Proposers should tailor CRM workflows to public sector and programmatic use cases rather than commercial sales models.

73. Are quotes, proposals, or cost estimates part of the process? If yes, should they be generated from the CRM?

Response to Question #73: No. However, Community Power expects the CRM to support:

- Incentive calculations
- Budget tracking
- Program cost summaries

These functions should be configurable within the CRM or integrated with financial systems as needed.

74. Do you currently track customer interactions, follow-ups, or communication history?

Response to Question #74: Yes, the current CCDM-hosted CRM tracks customer interactions, follow-ups, and communication history.

75. Does SDCP have a specific, assigned allotment of D365 licenses in the current outsourced system? If so, please share. If not, what are the anticipated number of licenses (full user vs. light/read-only)?

Response to Question #75: Community Power does not own any D365 licenses outright. Please refer to the Response to Question #64 for additional information.

VII.   Security, Compliance & Data Governance

76. What data archival, retention, and purging requirements must the CRM satisfy to comply with Community Power's internal policies and external regulations?

Response to Question #76: Community Power expects the CRM platform to support configurable data archival, retention, and purging policies that align with applicable regulatory mandates, Community Power's IT and Data governance and records retention policies as well as operational requirements.

77. Are there any specific compliance frameworks (e.g., CCPA, HIPAA, CPUC energy efficiency reporting) that the CRM must align with?

Response to Question #77: Yes. The CRM must align with relevant compliance frameworks, including but not limited to:

- California Consumer Privacy Act (CCPA)
- CPUC energy efficiency reporting requirements (especially for SDREN programs) as well as AMI covered information requirements.
- General data protection and cybersecurity best practices. While HIPAA is not currently applicable, the CRM should be designed with flexibility to accommodate future compliance needs

Please refer to the RFP's **Attachment E** for more information about the relevant compliance frameworks.

78. What level of data segregation is required for the SDREN instance — separate CRM tenant, database partitioning, or role-based access?

Response to Question #78: The CRM must support data segregation for SDREN to ensure privacy compliance. This may be achieved through:

- A stand-alone instance or tenant
- Database partitioning with strict access controls
- Role-based access to ensure SDREN data is firewalled from Community Power customer data.

Proposers should ensure that the final approach should be determined based on the RFP's evaluation requirements noted in Section V.F (Proposal Evaluations and Criteria).

79. What percentage of CRM data (estimated) will be classified as sensitive under applicable regulations (PII, PHI, PCI)?

Response to Question #79: Community Power cannot provide an estimated percentage for PII, PHI, or PCI at this time. Community Power expects that the enterprise-wide CRM solution will host sensitive data that includes PII such as customer names, addresses, account and meter numbers, and contact details. The CRM must treat all customer data as sensitive and apply appropriate security and privacy controls accordingly.

80. Are there any specific federal, state, or industry regulatory requirements (e.g., CCPA, HIPAA, FISMA, NIST) that the CRM solution must comply with, beyond general PII/PHI/PCI considerations?

Response to Question #80: Yes. In addition to CCPA and CPUC reporting requirements, the CRM should align with the requirements outlined in the RFP's **Attachment E** for cybersecurity standards and general best practices for public sector data management. While HIPAA and FISMA are not currently mandated, the system should be designed to accommodate evolving regulatory landscapes.

81. Other than Cloud Native security tools, do you have preference for deploying third party security tools like CSPM to centrally manage security findings, SOC monitoring SIEM/SOAR solution, data security solutions, dedicated network firewall along with IDS/IPS tool, WAF etc.?

Response to Question #81: Community Power expects the Proposer to prescribe all third-party tools specific to the proposed CRM solution that will support integration with industry-standard security tools.

In accordance with the RFP, Proposers should recommend a security architecture that aligns with industry best practices and supports centralized monitoring and incident response.

82. Do you expect a dedicated APIs security solution for rate limiting, Bot Detection, OAuth 2.0, JWT, RBAC?

Response to Question #82: See Response to Question #81. Yes. The CRM platform should support or integrate with a dedicated API security solution. Any proposed features should ensure secure and scalable API interactions with internal and external systems.

83. What are the data retention and archival policies for CRM data platform, both from operational and reporting standpoints?

Response to Question #83: Operational data should be retained in the CRM for active use, while historical data should be archived securely for reporting, auditing, and compliance. The CRM must support configurable retention schedules, automated archival workflows, & secure access to archived data for reporting and compliance. Final policies will be defined during implementation in consultation with Community Power's legal and compliance teams.

84. Should the CRM support explicit customer consent management (e.g., opt-in for campaigns, preferred communication channels) in compliance with privacy laws?

Response to Question #84: Yes. The CRM must support explicit customer consent management, including:

- Opt-in/opt-out tracking for communications
- Preferred communication channels
- Consent history and audit logs

VIII.   Forms, Web Portals & Public Interfaces

85. What CMS is used for Community Power's public-facing website where intake forms will be embedded?

Response to Question #85: Intake forms are currently embedded and managed by the incumbent CCDM vendor. Proposers should design web-based forms that are CMS-agnostic and can be securely embedded using the appropriate script, API Integration, or other tools.

86. Are there language localization or accessibility (ADA/WCAG) compliance needs for the CRM interface or public-facing forms?

Response to Question #86: Yes. All future public-facing forms developed as part of the new CRM implementation must comply with ADA/WCAG 2.1 accessibility standards and support language localization, including integrated language support for Community Power's diverse customer base. The expectation for the future-state CRM is full compliance with accessibility and multilingual communication standards for both the CRM interface and any public-facing components.

87. Will applicants (e.g., customers, contractors) need to create accounts to track submissions or application status?

Response to Question #87: Yes, for certain programs, applicants may need to create accounts to Submit applications, Upload documentation, Track application status, & Receive communications. The CRM should support secure user account creation with role-based access and optional multi-step workflows for different user types (e.g., customers, contractors, nonprofit partners).

88. Can SDCP share a sample intake form? How many forms exist (Le. different for each city)?

Response to Question #88: Please see the response to Question #85. Proposers should plan for a discovery phase to inventory existing forms and design a scalable intake form framework that supports multiple programs and jurisdictions.

IX.   Reporting, Dashboards & Analytics

89. What reporting or BI tools are currently in use (Power BI, Tableau, Excel)?

Response to Question #89: The RFP references integration with Power BI, Tableau, and Looker for data visualization and reporting. Community Power staff also uses Excel for ad-hoc analysis. The CRM must support integration with these tools and enable self-service reporting.

90. For reporting and analytics, are we looking at self-service, batch, scheduled, or ad-hoc reporting only, or is there also a need for near real-time analytics such as KPIs on power usage, customer contact centre metrics and service levels?

Response to Question #90: Yes to all the above.

91. Are there required reporting formats for external stakeholders such as CPUC?

Response to Question #91: Yes. Community Power must comply with CPUC reporting requirements, particularly for SDREN energy efficiency programs. As described in the RFP, the CRM must support:

- Export to standard formats (CSV, Excel, PDF)

- Customizable templates

- Audit-ready reporting aligned with regulatory guidelines

92. What types of reports, dashboards, or performance metrics do different teams need? Should the CRM integrate with tools like Power BI?

Response to Question #92: Yes, integration with tools like Power BI is expected. The CRM must support customizable dashboards and role-based access to reports. Reporting needs vary by teams and Proposers should refer to the Use Cases more particularly described in the RFP's **Attachment A** for more information.

93. What are the common or expected reporting needs? Count, complexity? Do these reports exist currently in the outsourced CCDM CRM?

Response to Question #93: Many of these reports are currently generated through the CCDM-hosted CRM and SQL Server Views. The new CRM must replicate and enhance these capabilities with improved flexibility, automation, and user access.

X.   AI/ML & Future State Planning

94. Are there any AI/ML use cases currently being explored or planned for CRM? And do we have access to labelled training datasets, or would those need to be prepared as part of future-state planning?

Response to Question #94: The RFP does not specify current AI/ML use cases. However, Community Power is open to exploring AI/ML capabilities in the future. Labeled training datasets are not currently available and would need to be developed as part of future-state planning. Proposers may suggest AI/ML readiness strategies as part of their implementation roadmap.

XI.   CRM Functional Requirements

95. Which of the following CRM functions are required?

- Lead and Contact Management
- Case / Support Ticket Management
- Program or Project Tracking
- Vendor/Partner Collaboration
- Appointment Scheduling / Calendaring
- Email/Communication Logging
- Task and Activity Management
- Surveys or Feedback Collection
- Marketing Campaigns / Outreach
- Customer Self-Service Portal
- Document Generation (PDFs, letters)

Response to Question #95: All of the above.

96. What does the current CRM Instance (from CCDM) cover functionality-wise, and what is the missing functionality?

Response to Question #96: The CCDM-hosted Microsoft Dynamics 365 CRM currently supports:

- Customer interaction tracking (IVR, email, web forms)
- Data integration from SDG&E
- Program and service level participation records
- Contact center operations
- Statutory and non-statutory customer mailer tracking

Desired functionality includes:

- Ownership and control by Community Power
- Full customization and extensibility
- Role-based access for external partners
- Integrated reporting and analytics
- Program-specific workflows and dashboards

97. What are the potential systems to be integrated with D365 for this purpose? Or does all of this functionality reside in the new CRM? Is this functionality in the current CCDM CRM?

Response to Question #97: The new CRM must integrate with:

- CCDM-hosted Dynamics 365 (for transition)
- SDG&E (EDI daily feeds and weekly metadata refreshes)
- DERMS
- Granicus GovDelivery
- Community Power's future EDP
- Third-party implementer systems (e.g., for SDREN)

The new platform must consolidate and expand capabilities under Community Power's ownership. Please see the response to Question #96 for more information about desired functionality.

98. Are there integration needs directly with the cities?

Response to Question #98: While Community Power considers its member agencies to be key and strategic partners, there is no expectation that the enterprise-wide CRM solution would directly integrate with any of our member agencies' systems . Please see the response to Question #64 for more information. CRM should support tracking of these relationships and may need to support data sharing or reporting to city partners in the future.

99. Is D365 currently leveraged for marketing campaigns or is this "net new" functionality being requested? If currently leveraged, please share details or functionality in place.

Response to Question #99: Marketing and outreach campaign tracking is currently supported through the CCDM CRM and other platforms used by Community Power's Public Affairs team, but the extent of functionality is limited. The new CRM should support enhanced campaign management, including:

- Segmentation
- Outreach tracking
- Integration with Granicus GovDelivery
- Performance analytics

XII. **Governance, Administration & Support:**

100. What governance model do you envision for the CRM platform post-implementation (e.g., admin roles, change management, enhancement requests)? Who will own the CRM roadmap internally?

Response to Question #100: Community Power expects Proposers to propose a Governance Model that conforms to the RFP requirements. Proposers should include a governance model that includes, but is not limited to, the following:

- Designated CRM administrators
- Role-based access control
- Structured change management and enhancement request processes
- Departmental input into roadmap planning

101. What communication and support tools are required (like email, calling, chatbot, ticketing, knowledgebase)?

Response to Question #101: The CRM should support or integrate with:

- Email and call logging
- Web form submissions
- Ticketing/workflow management
- Knowledgebase for internal and external users
- Optional chatbot integration for self-service

102. Does the CRM need to support low-code/no-code customization to allow non-technical users to configure reports, workflows, and forms without developer involvement?

Response to Question #102: Yes. The CRM should support low-code/no-code customization to empower business users to:

- Build and modify reports
- Configure workflows

- Create and update intake forms This is essential for long-term sustainability and agility.

103. Is there an internal Organizational Change Management (OCM) capability or is selected?

Response to Question #103: Community Power has internal OCM capacity for when the system goes into production.

104. Is selected vendor expected to provide regular administration and maintenance of CRM (including access to Production environment)? is selected vendor expected to act as IT support directly to end users (Tier 1) or Tier 2?

Response to Question #104: The selected vendor is expected to provide administration and maintenance during the contracted support period, support Tier 2 technical issues, & train Community Power staff to assume long-term administration. Tier 1 support will be handled internally post-transition for ongoing operations and recommended staffing and administration strategies to ensure long-term sustainability of the CRM platform.

105. Does SDCP require use of Microsoft Government Cloud or does Commercial Cloud meet compliance requirements? If Government Cloud, has SDCP identified whether GCC or GCC High would be required?

Response to Question #105: The RFP does not mandate a specific cloud-based platform. Either Microsoft Government Cloud or Commercial Cloud are acceptable if they meet all compliance and security requirements. Proposers may recommend Government Cloud (GCC or GCC High) if it offers clear advantages for data protection or regulatory alignment.

106. Training: Does SDCP envision/require train-the-trainer or multiple training sessions for different roles?

Response to Question #106: Yes.

107. Will SDCP store documents (i.e agreements) along with customer or any other data in CRM/SharePoint?

Response to Question #107: Yes. The CRM should support document storage and linking.