



## Recommendation for Action

---

**File #: 22-2083, Agenda Item #: 22.**

6/16/2022

---

### **Posting Language**

Authorize negotiation and execution of a contract with Sikich LLP d/b/a Sikich for a customized Microsoft Dynamics Customer Relationship Management software platform and support services, for a term of four years in an amount not to exceed \$500,000.

(Note: This procurement was reviewed for subcontracting opportunities in accordance with City Code Chapter 2-9C Minority Owned and Women Owned Business Enterprise Procurement Program. For the services required for this procurement, there were no subcontracting opportunities; therefore, no subcontracting goals were established).

### **Lead Department**

Financial Services Department.

### **Client Department(s)**

Economic Development Department.

### **Fiscal Note**

Funding in the amount of \$125,000 is available in the Fiscal Year 2021-2022 Operating Budget of the Economic Development Department. Funding for the remaining contract term is contingent upon available funding in future budgets.

### **Purchasing Language:**

Professional Service.

### **For More Information:**

Inquiries should be directed to Marina Ciferri, at 512-978-1759 or [Marina.Ciferri@austintexas.gov](mailto:Marina.Ciferri@austintexas.gov) [<mailto:Marina.Ciferri@austintexas.gov>](mailto:Marina.Ciferri@austintexas.gov).

### **Additional Backup Information:**

The contract will provide a customized Microsoft Dynamics Customer Relationship Management (CRM) software platform and support services. The CRM software platform provides organization and standardization to the Economic Development Department's (EDD) data as well as the ability to easily report outcomes to the public via dashboards and reports.

Before implementation of the CRM software, the EDD used applications such as Excel, Word, Survey Monkey, ZoomGrants, PublicArtist, Submittable, and a variety of email communication tools to gather and track client data. The data was not comprehensively shared or comparable across datasets. This created a duplication in services; a lack of standardization in performance measure reporting; and inconsistent outreach to clients due to the siloed nature of these products.

The solution provided by Sikich LLC is customized specifically for the EDD. Since 2018, Sikich LLC has worked with business analysts and developers at the EDD on project deliverables, customized solutions, and

customized training material for future CRM users.

**Strategic Outcome(s):**

Economic Opportunity and Affordability.