Responses to Questions and Requests for Clarification

Comprehensive Analysis of Business Attraction Methods for Invest Puerto Rico (IPR)

Q1. Is it the first time this kind of analysis is conducted by Invest Puerto Rico? If not the first time, when was the last time it was produced? Can you share the previous report?

Invest Puerto Rico does annual reporting of its public facing KPIs (see here), and we have done ROI fiscal impact analysis on actual job creation metrics. This will be the first time that we do an analysis of specific business attraction methods.

Q2. Can you share a list of current technology tools used internally (company databases for prospection, CRM, dashboards, AI, RFP/RFI Management, etc.)

We use Salesforce Sales Cloud - Enterprise Edition with Government Cloud Plus and Premier Success Plan as a CRM. Regarding reporting dashboards - we use Tableau Designer under a single Creator license. Most of the datasets feeding the dashboard are live connections to Salesforce objects, and the data is refreshed hourly. We also use Zoom Prospector, LinkedIn Sales Navigator, Claude AI, ChatGPT, as well as specific lead generation consultants for prospection.

Q3. Can you share what is expected to be included in the Initial Report (due February 2026)?

The deliverables included in Work Streams 2.1 and 2.2 of the RFP.

Q4. Is there an established budget for this RFP?

There is a budget range of approximately $85,000-150,000 for this project. We are seeking value and quality, not just the lowest price.

Q5. The timing is set at 6 months. Is there any flexibility to that timeline? Is there a legislative or policy reason for the proposed timeline?

The timeline is a response to a milestone list imposed by the Fiscal Oversight & Management Board of Puerto Rico (FOMB). That said, we welcome realistic timeline assumptions in the RFP responses and are open to being flexible in terms of specific dates.

tel. +1 787-966-7642
www.investpr.org

200 Convention Boulevard
The Hub, Suite 301
San Juan, PR 00907

Q6. Are you looking for a new set of peers or to reevaluate peers that were covered in a previous report?

This is the first time we will be doing this type of analysis.

Q7. What tools and technologies does InvestPR currently use to support: 1) business attraction efforts (e.g., lead identification and management), and 2) tracking and reporting of business attraction efforts and outcomes?

See the response to Q2.

Q8. So that we can best tailor our response, can you share the budget range that has been established for this project?

See the response to Q4.