Request for Proposal (RFP)

CRM Architecture Optimization, Systems Integration & Technical Operations Support
Invest Puerto Rico

1. Introduction

About Invest Puerto Rico

Invest Puerto Rico Description: Invest Puerto Rico (InvestPR) is an economic development organization for Puerto Rico with the mission to promote Puerto Rico as a competitive investment jurisdiction to attract new business and capital investment to the island. Invest PR is a 501 (c) 3 not for profit entity organized under the laws of Puerto Rico.

Purpose of this RFP

InvestPR is seeking proposals from qualified digital technology and CRM consulting firms to review and finalize CRM data normalization, optimize multi-system integrations and automated workflows, and provide ongoing technical operations support.

2. Project Overview

Background

InvestPR relies on a connected technology ecosystem to generate, track, and convert global business investment opportunities. To maximize operational efficiency and ensure reliable reporting, we require a consolidated technical project to validate and complete our CRM data foundation, optimize synchronization across martech ecosystem platforms, and manage ongoing CRM maintenance tasks.

Objectives

The selected vendor will support InvestPR in achieving the following:

- **Validate and Finalize Data Normalization:** Ensure existing CRM properties, custom objects, and data structures are in order and complete any outstanding cleanup.
- **Optimize Cross-Platform Integrations:** Establish seamless, automated data synchronization across marketing automation, paid media, sales enablement, and scheduling tools.

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- **Maintain System Health & Operations:** Execute routine CRM operational tasks, user management, custom reporting, and technical troubleshooting.
- **User Enablement & Knowledge Transfer:** Empower internal teams through comprehensive user training, structured onboarding processes, system manuals, and continuous enablement support as platform updates and architectural changes are deployed.

Scope of Work

The selected firm will execute a comprehensive project encompassing data architecture alignment, core system integrations, and ongoing technical support:

- **Data Architecture Review & Cleanup:** Review current CRM properties, custom objects, and user views to validate existing data hygiene work. Identify gaps, normalize naming conventions, eliminate any remaining redundant fields, and ensure standardized mapping rules are fully operational across all records.
- **Marketing Automation & Lead Management Integration:** Audit and streamline property synchronization, lead scoring models, and automated contact lifecycle triggers between marketing tools and the core CRM.
- **Paid Media & Conversion Tracking Integration:** Optimize integration mechanics between advertising platforms and the CRM to support accurate offline conversion tracking, campaign attribution, and automated source mapping.
- **Sales Enablement & External Tool Alignment:** Integrate direct outreach tools, scheduling applications, and connected third-party systems to ensure automated activity logging, meeting routing, and record creation.
- **Cross-Platform Workflow Standardization:** Standardize operational workflows across all connected applications to guarantee data consistency, accurate lead routing, and efficient handoffs.
- **CRM Operational Maintenance & Support:** Execute routine CRM technical tasks, including user permissions, view updates, dashboard builds, and bulk data updates.
- **Technical Troubleshooting:** Provide ongoing support to diagnose and resolve integration errors, sync delays, or data mapping inconsistencies across connected systems.
- **User Training, Onboarding & Change Enablement:** Design and deliver training sessions for internal users covering core CRM operations (including list uploads, lead management, activity tracking, and record documentation). Establish standard onboarding protocols and detailed user manuals for new team members. Provide ongoing enablement and documentation whenever CRM optimizations, new workflows, or architectural changes are implemented.
- **Platform & Tool Disclosure:** Specific CRM, marketing automation, advertising, and scheduling platforms currently in use will be disclosed to shortlisted finalists under a signed non-disclosure agreement during the evaluation process.

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3. Deliverables

- **Data Health Review & Remediation Summary:** Report confirming database validation, field standardization, and completion of remaining data cleanup.
- **Ecosystem Integration & Workflow Architecture:** Visual documentation outlining all connected applications, data flows, field mappings, and cross-platform automation rules.
- **Standard Operating Procedures (SOPs) & User Manuals:** Comprehensive documentation covering data governance protocols, technical system setups, user role guidelines, and step-by-step training manuals for core CRM functions (list uploads, lead management, activity tracking, and documentation protocols).
- **User Training & Enablement:** Delivery of structured training sessions for internal teams on CRM fundamentals, onboarding processes for new users, and supplemental training materials when major architectural or workflow changes are introduced *(recorded sessions optional/as applicable)*.
- **Ongoing Operational Support:** Execution of routine CRM administrative tasks, custom report builds, integration monitoring, and monthly support logs.

4. Timeline

Milestone	Date
RFP Issued	Fri, Aug 7, 2026
Questions Due	Fri, Aug 14, 2026
Responses to Questions	Wed, Aug 19, 2026
Proposal Submission Deadline	Fri, Aug 28, 2026, 6:00 PM AST
Evaluation Period	Mon, Aug 31 – Fri, Sept 4, 2026
Award Notification	Tue, Sept 8, 2026
Project Start	Mon, Sept 14, 2026

5. Proposal Requirements

Proposals should include:

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A. Firm Overview

- Company background, history, and core technical competencies.
- Primary office location(s) and overall corporate structure.

B. Relevant Experience

- Proven experience managing enterprise CRM restructures, data hygiene projects, and complex marketing/sales integrations.
- Case studies demonstrating measurable results in data normalization, system efficiency, or campaign attribution.

C. Technical Approach

- Overall methodology and work plan for completing data validation, configuring multi-tool integrations, and managing technical support tasks.
- Overview of tools, frameworks, or data quality software utilized during execution.

D. Project Team

- Key personnel and technical leads assigned to the InvestPR account.
- Bios and certifications for team members (e.g., enterprise CRM platforms, marketing technology, analytics).

E. Timeline

- Proposed implementation schedule detailing major project milestones and task execution.

F. Budget Proposal

- Detailed cost breakdown separating implementation deliverables from ongoing technical support services.
- Pricing structure (fixed fee, hourly rates, retainer, etc.).

G. References and general information

- Contact information for at least two (2) clients or former clients provided similar CRM integration and data governance services.
- Contact information for at least three (3) professional references.
- A statement regarding any potential conflicts of interest (if none exist, explicitly state so).

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6. Evaluation Criteria (varies by proposal)

A. Ability and Capacity to Perform Services: The ability, capacity, skill, financial and other necessary resources of the Proposer to perform the work or provide the services required.
B. Costs, Fees and Expenses: The reasonability of the costs, fees and expense structure provided by the Proposer given the complexity of the tasks and projects requested from the service provider.
C. Examples of Work Product: The quality of examples of previous work product from previous engagements or professional endeavors of the Proposer or Proposer's professionals that will be involved in providing the services being procured; and
D. References: The character, integrity, reputation, judgment, experience, and efficiency of the Proposer or Proposer's professionals that will be involved in providing the services being procured.

*Respondents must provide a listing of the personnel to be assigned to the project, including organizational structure and each person's area of responsibility. Resumes for each professional assigned to this project are also required. Responders must have enough qualified staff immediately available to contract solicitations and to enter and manage any components targeted by the RFP.

Proposals will be evaluated by the InvestPR selection committee based on the following weighted criteria:

- **[50]% Ability and Capacity to Perform Services:** Expertise in CRM data architecture, cross-platform integrations, workflow automation, user training delivery, and technical support availability.
- **[20]% Costs, Fees, and Expenses:** Reasonability, clarity, and competitiveness of proposed pricing.
- **[20]% Examples of Work Product:** Quality of past deliverables, including integration maps, SOPs, user manuals/training materials, and technical case studies.
- **[10]% References:** Demonstrated reliability, technical execution, communication, and client satisfaction from provided references.

7. Budget

- Vendors should submit a detailed, itemized cost proposal separating one-time implementation costs from ongoing monthly technical support fees, including their proposed pricing structure (fixed fee, hourly, retainer, etc.). InvestPR anticipates an engagement term from Project Start through June 30, 2027, with the option to renew.

8. Submission Instructions

- **Format:** PDF
- **Submission Method:** Email to talmodovar@investpr.org
- **Deadline:** Fri, Aug 28, 2026, 6:00 PM AST
- **Subject Line:** *RFP Response – CRM Architecture Systems Integration & Ops Support*

Contact for Questions

Teresa Almodovar
Digital Marketing Director
talmodovar@investpr.org

9. Terms & Conditions

- InvestPR reserves the right to accept or reject any proposal
- All submitted materials become property of InvestPR
- Confidentiality & data security must be maintained
- Contract terms will be negotiated upon selection

10. Questions & Clarifications

- Questions must be submitted via email by **Fri Aug 14, 2026.**
- Responses will be shared with all participating vendors.

RFP Addendum #1 — Revised Timeline

RE: CRM Architecture Optimization, Systems Integration & Technical Operations Support

This Addendum amends the timeline published in the Request for Proposal issued by Invest Puerto Rico (InvestPR) on August 7, 2026. All other terms, requirements, and conditions of the original RFP remain unchanged.

To allow vendors additional time to prepare questions, the Questions Due date has been extended, which shifts the remaining milestones as follows:

Milestone	Original Date	Revised Date
Questions Due	Fri, Aug 14, 2026	**Fri, Aug 21, 2026**
Responses to Questions	Wed, Aug 19, 2026	**Wed, Aug 26, 2026**
Proposal Submission Deadline	Fri, Aug 28, 2026, 6:00 PM AST	**Fri, Sept 4, 2026, 6:00 PM AST**
Evaluation Period	Mon, Aug 31 – Fri, Sept 4, 2026	**Tue, Sept 8 – Mon, Sept 14, 2026**
Award Notification	Tue, Sept 8, 2026	**Tue, Sept 15, 2026**
Project Start	Mon, Sept 14, 2026	**Mon, Sept 21, 2026**

All questions must now be submitted by email to Teresa Almodovar (talmodovar@investpr.org) no later than **Friday, August 21, 2026**. Responses will be shared with all participating vendors by **Wednesday, August 26, 2026**. Proposals remain due in the format and manner specified in Section 8 of the original RFP, by the revised deadline above.

Questions regarding this Addendum should be directed to Teresa Almodovar, Digital Marketing Director, talmodovar@investpr.org.

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