

RTO 1 – Customer (Participant) Relationship Management System Replacement

Background/Problem:

FRTIB currently operates the Participant Service Representative (PSR) application as the primary interface to the TSP Recordkeeping system for the Agency's contact center representatives' interaction with TSP participants. In addition, the PSR application supports Agency and contractor staff for conducting research on participant transactions and issues.

On a daily basis, the application processes output from the core recordkeeping system and stores results within an application data source. In addition to the application data source, it also integrates bi-directionally with almost every other major application within the TSP Recordkeeping system.

FRTIB has performed an assessment of the current application's features, the Agency's desires for additional functionality, and the availability of viable commercial CRM packages. FRTIB has determined that there are several commercially available packages that may meet FRTIB's requirements. FRTIB's determination is that the best course is to replace this application with a COTS product that offers enhanced functionality, better integration capabilities, improved security, and a more modern user interface.

Current Process/Environment

The application's primary feature is performing various types of participant account inquiries, and also creates transactions in the core recordkeeping system. This application is an in-house developed ColdFusion web application that was built in 2003. The application has its own data store, but also integrates bi-directionally with almost every other major source of data with the TSP Recordkeeping system. The primary users of this application are contact center representatives for responding to participant phone inquiries, but there are numerous other internal business users of the application.

Assumptions

For the purposes of this RTO, Offerors are to assume that:

- FRTIB will select a COTS package from the options provided by the Offeror and FRTIB will acquire any software licenses associated with the chosen COTS package.
- FRTIB will approve the service design package.
- The new augmentation is to be added into the production TSP Recordkeeping system. The Offeror should assume that the new augmentation would consist of adding only software components in order to integrate into the existing system.
- Assume that all labor associated with this RTO must be covered under this task order.

Period of Performance:

The period of performance for this Scenario is for 1 year. The Offeror must use the following dates for the period of performance for this Scenario: October 1st, 2013 through September 30th, 2014.

