

REQUEST FOR INFORMATION (RFI)

FOR

THE PROVISION OF MERGE FUNCTIONALITY IN DYNAMICS 365 for CRM

Request for Information (RFI) No.:	RFI-001470
Issued:	September 16, 2022
Submission Deadline:	2:00 PM EDT, October 7, 2022
Address Inquiries to RFI Contact:	Ryan Lemay, Senior Procurement Advisor
Email:	rlemay@cmhc-schl.gc.ca

1. INTRODUCTION

Canada Mortgage and Housing Corporation (CMHC) is Canada's national housing agency. At CMHC, we are driven by our belief that everyone in Canada should have a roof over their head, and that a world-leading housing system can be the cornerstone of a thriving and inclusive society.

We work with community organizations, the private sector, non-profit agencies and all levels of government to contribute to the stability of the financial system, facilitate access for Canadians in housing need, and offer objective housing research and advice to governments, individuals and the housing industry.

We are a Crown Corporation and we report to Parliament through the Minister of Housing and Diversity and Inclusion.

Our 2,000 employees work in locations across Canada and our impact is felt across the housing system.

A comprehensive Company profile of CMHC can be found at www.cmhc-schl.gc.ca

2. DEFINITIONS SUMMARY

CMHC	Means Canada Mortgage and Housing Corporation
Industry	Means potential suppliers with expertise in providing out-of-the-box merge software.
RFI	Request for Information
RFP	Request for Proposal
Respondents	Potential vendors submitting a response to the RFI
Proponents	Potential vendors submitting a proposal to the RFP

3. PURPOSE

The purpose of this RFI is to seek information from Industry on its ability to provide to CMHC a comprehensive out-of-the box duplicate detection, merge, batch merges, reporting and business rule settings software for Dynamics 365 customer engagement platform.

4. BACKGROUND

CMHC recently completed a technology transformation which resulted in multiple legacy systems migrating records into our CRM platform (Dynamics 365 for CRM / Customer Engagement) this has resulted in duplicates in both out of the box and custom entities.

CMHC currently uses the out of the box merge functionality accessible in Account (which CMHC calls Organization) and Contact entities.

The merge functionality allows automatic combination of the two records, as well as updating automatically any connections associated with these two records. (ex. information connected to a specific organization is automatically updated by the merge functionality – Referred as cascading effect).

There is a need to implement a Merge functionality within custom entities. This function does not currently exist, and any duplicate records need to be manually updated, taking significant time and effort.

Users must manually identify records, identify the information to be retained, and any connections associated with the records. This is complex, time consuming and requires deep knowledge of the connections approach.

The out of the box CRM merge functionality does not allow more than 2 records to be merged at a time, which requires users to perform multiple merges to result in a single unique record.

5. REQUIREMENTS

CMHC has developed the following initial direction of the scope and the technical requirements:

In Scope of Work:

CMHC is seeking an out-of-the box and custom entity merge, batch merge, duplicate detection, reporting and business rule settings software solution capable of meeting the following technical requirements:

TABLE A: Solution Requirements		
ID	Priority (Critical, High, Medium, Low)	Solution Requirements
1.1	Critical	Merge functionality within the CRM out of the box and custom entities.
1.2	High	MS Dynamic 365 Customer Engagement Supported Solution
1.3	Low	Works with MS Dynamics for Finance and Operations
1.4	Critical	Automatic update of connections associated with merges (referred as Cascading effect)
1.5	High	Capability to resolve duplicates through rapid validation and merge
1.6	High	Optimize continuous prevention, identification, and resolution of duplicates
1.7	Critical	Multiple Record Merges (Batch merges)
1.8	High	Configuration duplicate detection to allow fewer false negatives and / or improved fuzzy logic
1.9	Critical	Merge functionality on any future custom entities that need uniqueness to be maintained
1.10	High	Merge functionality that is not error prone and does not have time out errors – identify limits if any exist (number of records in batch merge, number of child records to re-parent, depth of cascade)
1.11	Medium	Ability to undo the merge (including the connected records cascading effect)
1.12	High	Ability to call this functionality (merge, unmerge-desired) as a service in real time and in batch mode. Required for integration with tools such

		as master data management. Identify which how this service is called
1.13	Critical	CMHC data does not leave Canada (storage or in-transit)
1.14	Medium	CMHC data does not leave our CRM CMHC cloud tenancy
1.15	High	Ability to Track and/or Report on Duplicates and previously completed mergers
1.16	Medium	Visibility or lineage to the contributing records is maintained and readily available. For example, if record (a) and (b) are merged, CMHC seeks the ability to review the source of the contributing attributes (which data points originated from record a or record b). This information should be captured in the solution and if possible accessible via API and user experience.
<ul style="list-style-type: none"> • Requirements categorized as Critical are MANDATORY requirements the solution must meet. • The remaining requirements categorized as either High, Medium, or Low are requested as part of the solution, although they are not critical to the function. 		

In addition, CMHC is also looking for the following information:

TABLE B: Additional Solution Requirements Information	
Item #	Additional Solution Requirements Information
1	Impact on existing out of the box duplicate merge functionalities.
2	How customizable are the duplicate and merging rules?
3	Licensing <ul style="list-style-type: none"> • Describe the licensing requirements for CMHC to use the proposed solution
4	Implementation <ul style="list-style-type: none"> • Example and suggested implementation strategies for the proposed solution
5	Data residency consideration (cannot be stored outside Canada)
6	Cost estimate (considerations, structure, etc.)

CMHC may request Respondents to conduct a technical demonstration to explain how the solution meets its requirements and/or respond to any questions CMHC may have.

Out of Scope of Work:

CMHC is not looking for an enterprise data quality and/or Master Data management (MDM) solution, given that CMHC has already selected a MDM tool. The solution researched is a Dynamics 365 CRM specific solution for operational needs.

6. ACQUISITION STRATEGY

CMHC intends to conduct a three (3)-stage procurement process under Solicitation Number RFI-001470.

Stage #	Purpose	Document
1	Seek Information from capable companies	Request for Information (RFI)
2	Select Company(ies)	Request for Proposals (RFP)
3	Contracting	Agreement negotiation and ratification

Stage 1: RFI

Responses submitted under this RFI are non-binding. The issuance of the RFI is not to be considered in any way as a commitment by CMHC or as authority to undertake any work described under Section 5 above.

The main purpose of this RFI is to obtain feedback from Respondents regarding a comprehensive out-of-the box duplicate detection, merge, batch merges, reporting and business rule settings software for Dynamics 365 customer engagement platform as outlined in Section 5 above.

Stage 2: RFP

CMHC will issue a Request For Proposal. Full proposals will be evaluated in accordance with the evaluation criteria identified in the RFP. Shortlisted proponents may enter negotiations with the CMHC.

Stage 3: Contracting

The selected proponent(s) from the RFP may enter into negotiations with CMHC and sign an agreement.

7. REVIEW OF THE RFI

CMHC reserves the right to request additional information for clarification during the review of the responses to this RFI, and/or to consider a subsequent modification of the response put forward by a Respondent.

No payment will be made by CMHC for any costs incurred and associated with the preparation and submission by the Respondent of responses to this RFI. All costs are the sole responsibility of the Respondent.

8. NO OBLIGATION

The issuance of this RFI does not create an obligation for CMHC to issue a subsequent competitive procurement process and does not bind CMHC legally or otherwise, to enter into any agreement or to accept any suggestions from Respondents.

This RFI process is not a bid solicitation and a contract will not result from this request.

9. CONFIDENTIALITY

Information provided by Respondents through their RFI response is subject to the Access to Information Act. Respondents should identify any submitted information that is to be considered as either company confidential or proprietary. CMHC will not reveal any designated confidential or proprietary information.

10. INFORMATION WILL NOT BE RETURNED

The RFI response and any accompanying information or documentation provided by a Respondent will not be returned.

11. INFORMATION IN RFI ONLY AN ESTIMATE

CMHC make no representation, warranty or guarantee as to the accuracy of the information contained in the RFI or issued by way of addenda. Any quantities shown or data contained in this RFI, or provided by way of addenda, are estimates provided only as general background information.

12. LANGUAGE

RFI responses are to be provided in one of the two official languages of Canada (English or French).

13. GOVERNING LAW

This RFI process will be governed by and construed in accordance with the laws of the province of Ontario and the federal laws of Canada applicable therein.

14. RFI RESPONSE OBJECTIVES

This RFI is being posted on buyandsell.gc.ca to allow for the public and private sectors to review the RFI and provide feedback. The responses received will be used to assist CMHC in finalizing the requirements and in developing achievable objectives and deliverables.

15. PROCUREMENT PROCESS

By this open RFI CMHC is seeking technically experienced, capable and financially stable companies to submit their interest in responding to a subsequent RFP for the provisions of the above mentioned requirements. Respondents should express their interest to CMHC by the closing date shown on this notice.

The timing of a subsequent RFP anticipated for Q2-2023.

16. TERMS OF REFERENCE

- If there are any questions relating to the requirements as provided, Respondents should direct their inquiries to the Contract Authority Ryan Lemay at the following address: rlemay@cmhc-schl.gc.ca and ProcurementSourcing_Sourcesd'approvisionnement@cmhc-schl.gc.ca by 02:00 pm ET on September 23, 2022.
- Answers to questions will be posted on September 30, 2022 unless they are of proprietary or confidential in nature;
- CMHC requests that the RFI responses be provided by email to the Contract Authority Ryan Lemay by 2:00 pm ET on October 7, 2022;
- CMHC reserves the right to request supporting details and validate any information, qualifications and capabilities provided by the Respondent(s);
- CMHC reserves the right to cancel this RFI at any point and/or refrain from issuing an RFP;

- Neither this RFI nor any subsequent selection process will in any way impose an obligation or responsibility on CMHC (i) to execute any contract with any Respondent and (ii) for any costs incurred by a Respondent to respond to this RFI. By submitting a response to this RFI, Respondents waive any right to seek costs or damages or any other remedy against CMHC with respect to this RFI or any subsequent RFP or other selection process.

17. RFI RESPONSE

The Respondent's RFI response should include the following items:

- A description of the Respondent's capabilities on delivering a comprehensive out-of-the box duplicate detection, merge, batch merges, reporting and business rule settings software for Dynamics 365 customer engagement platform, outlined in sections 5 above (maximum 2 pages total on the Respondent's letter head), inclusive of the Table B: Additional Solutions Requirements Information; and
- A brief explanation per each critical/mandatory requirement outlined in sections 5 above, as to how the Respondent meets each critical/mandatory requirement (maximum 2 pages total on the Respondent's letter head) inclusive of the Table B: Additional Solutions Requirements Information.