LOS ANGELES CLEANTECH INCUBATOR REQUEST FOR PROPOSALS (RFP)

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) IMPLEMENTATION

RESPONSES DUE: May 3, 2021 at 5pm

QUESTIONS: Questions may be submitted in writing no later than April 23rd.

Depending on the nature and complexity of the question/ clarification, LACI expects to respond within 72 hours.

INTRODUCTION

Los Angeles Cleantech Incubator (LACI) will be marking its 10th anniversary since its founding. As the organization matures, LACI is looking to integrate the many existing disparate data systems to build an integrated, robust infrastructure supporting its many stakeholders and investors, integrated with various programs, reporting systems, and communications platforms in a powerful Customer Relationship Management (CRM) system. In 2020, LACI engaged technical analysts, Status Not Quo (SNQ), to assess current state of data sources and desired future state integrated CRM, including a detailed map of all active data sources and functionality. SNQ recommended LACI customize its existing CRM Salesforce.com platform with a combination of bolt-ons and customized elements. LACI is seeking a full-service vendor to provide a complete migration and integration of existing data into a functionally bespoke Salesforce.com CRM.

BACKGROUND

LACI's mission is to create an inclusive green economy by unlocking innovation, transforming markets, and enhancing community. LACI aims to build a regional innovation ecosystem that supports the discovery and commercialization of clean technologies by creating new companies, de-risking the cleantech commercialization process, and helping companies successfully deliver market-ready cleantech solutions along with accompanying jobs. Founded by the City of Los Angeles and its Department of Water & Power (LADWP) in 2011, LACI is a nonprofit organization focused on energy, transportation, and sustainable cities. LACI was formed as an economic development initiative to transform a traditional blue collar industrial area into a thriving cleantech corridor. The organization utilizes a unique and integrated approach to spur the green economy to reduce statewide greenhouse gas emissions, improve air quality, create jobs, and generate local economic impact. LACI serves entrepreneurs, students, and job seekers around the world, but primarily in the greater Los Angeles region throughout LA County, with a focus on sustainable solutions for underserved communities. We also support initiatives in Santa Barbara, Orange and Ventura counties.

SERVICES NEEDED

LACI is accepting proposals with total fee-inclusion from qualified vendors certified in Salesforce.com integrations to lead the implementation process to deploy a Salesforce.com CRM software system. For the complete requirements and scope of the project, please refer to the SNQ Discovery attached herewith, including the detailed desired future state functionality. Your proposal scope will include:

- Scrub and migration of existing data sources
- Customization of CRM functionality
- Testing
- Deployment
- User-training

LACI is also looking for complementary post-implementation support for modification to future state functionality requirements. This will be post-project support. LACI is interested in understanding your firm's scope of service and estimated cost structure after this project has been completed.

PROPOSAL RESPONSE REQUIREMENTS

Respondents are required to provide the following information in a proposal, at their sole cost and expense. RFP must be limited to no more than 20 pages. Any sales or other related marketing materials not directly addressing the RFP, may be submitted in a separate appendix:

1. Proposal that contains the following information:
    a. Name, address and telephone number of the firm or contractor submitting proposal and resumes, including the name of the key contact person.
    b. The partner, manager, and in-charge accountant who will be assigned to LACI if you are successful in your bid, including biographies.
    c. Any judgments within the last three (3) years in which Respondent has been adjudicated liable for professional malpractice with explanations as applicable.
    d. Confirmation of Salesforce.com certification
    e. Background on your firm's experience working with nonprofits as well as with organizations who simultaneously serve multiple stakeholders (e.g., startups, investors, corporate sponsors, etc)
    f. Provide references with contact information from a minimum of three clients who currently use bidder's services. At least one of the clients must speak to the bidder's performance with nonprofits and/or state and federally funded entities.
    g. Your fully inclusive fee for total scope of project. Detail of the fee structure including a description of what would constitute out-of-scope work, as well as detailed anticipated timeline including key project milestones.

h. A proposed detailed timeline for various phases of the project and the milestones achieved therein. A payment structure that aligns to the milestones and reflects the full fee, inclusive.
i. Detailed functionality achieved at project completion.
j. Your firm's independence with respect to LACI.
k. A description of how and why your firm is rightly suited to serve our needs.

EVALUATION OF PROPOSALS

For all proposals, the lowest price estimate shall serve as the primary criteria for selection. Other areas that will be considered in making a determination will be:

- Demonstrated ability to serve in the key areas outlined above.
- LACI is committed to building a more inclusive ecosystem in the cleantech sector, qualified Respondents/Business Owners who are members of underrepresented groups such as women or people of color are strongly encouraged to submit quotes. Please indicate in your submission if you are a minority or women owned business.

Please submit any questions and final proposal to Shannon Wright, Sr Director Contracts and Compliance at LACI via email swright@laci.org.

LOS ANGELES CLEANTECH INCUBATOR

CRM Discovery & RFP Content Development

PRESENTED BY:

statusnotquo

Contents

statusnotquo
create | produce

Executive Summary

PROJECT OVERVIEW

The Los Angeles Cleantech Incubator (LACI) fosters innovation, specifically in the green community, by bringing the key individuals and organizations together with empowering tools and resources both inside the campus as well as within the surrounding neighborhoods.

LACI's Key Goal Areas:

- **Unlocking Innovation** – Empowering startups to accelerate the commercialization of clean technologies.
- **Market Transformation** – Convening partnerships in transportation, energy, and sustainable cities.
- **Enhancing Community** – Encouraging cleantech adoption through workforce development, pilots, and programs.

As LACI's key goal areas continue to flourish and, therefore, increase in complexity, LACI must have a centralized, scalable, and sustainable CRM as the foundation for unification.

Through a tailored knowledge share process as well as thorough "deep dive" interviews, Status Not Quo (SNQ) uncovered consistent opportunities to improve the efficiency of alignment between LACI operations and strategic organization initiatives, as highlighted in the Goals & Strategic Objectives section.

Ultimately, the purpose of this document is to:

- Summarize the existing environment in terms of personas, processes, and technology.
- Identify CRM requirements for future implementation.
- Analyze the former criteria and make recommendations around CRM implementation strategy and next steps.

Goals & Strategic Objectives

WHAT SUCCESS LOOKS LIKE

The following Goals and Strategic Objectives are the foundation by which success should be measured during the CRM selection, implementation, and launch processes.

This list represents the most significant mutual goals of every LACI team member and department across the organization when considering the areas where a CRM would provide the most value as well as the largest operational pain points as of current.

Data Consolidation
Implement a solution that centralizes shared data that can easily be accessed and leveraged across all departments.

Data Capture & Knowledge Share
Ensure the team's time is being used wisely by eliminating duplicate data capture in various, often separate, locations and improve efficiency of knowledge share.

Data Visualization
Provide a streamlined and straightforward method for slicing and dicing captured data to produce metrics required for reporting and run reports for strategic planning.

Data Monetization
Further formalize "sales" processes and improve coordination on upselling/cross-selling initiatives, including individual, department-wide, and organization-wide donor strategies.

Customer Experience
Through better data visibility and fundamental knowledge share, ensure organizational efforts are more coordinated and holistic to enhance the customer touch point (reduced communication, but heightened impact).

Platform Protocols & Training
Roll out effective guidelines for system use that uphold the integrity of its initial implementation, specifically as it pertains to data consistency. Additionally, offer effective training solutions for user empowerment.

Culture & Execution of Strategic Vision
Bring the team together by bringing the data together. Strengthen the culture and the execution of the organization's strategic vision through data empowerment and institutional knowledge share.

Discovery Process

HOW THIS INFORMATION WAS GATHERED

When it comes to attributing success in any way, setting clear and actionable objectives for a project is critical. Identifying these upfront ensures that all parties involved understand what success looks like. The primary objective of this discovery project is to determine what CRM will be most appropriate for LACI to ultimately implement and launch.

SNQ's process takes discovery beyond the simple question of asking, "What are your goals?" SNQ dives deep into the business processes at hand to evaluate all potential results or key factors that, if accomplished during implementation, would then lead you to view it as successful. It is our responsibility and expertise to go beyond the goals that our clients already envision and identify the relevant goals they might not even have known existed!

Project Kickoff

To begin, we established a project kickoff meeting to introduce SNQ to LACI, identify the project purpose and goals, establish communication/meeting procedures, review the project process and timeline, and, finally, set forth a subsequent plan of action.

Stakeholders & Users

SNQ's process for fully understanding the business processes at hand typically begins with stakeholder interviews. These interviews may be one-on-one with specific individuals or held in a group setting, within a department or team.

This step in the process, in particular, is incredibly insightful in providing SNQ with a broad pool of information to pull from when distilling CRM requirements as well as cultural considerations (i.e. hidden concerns or ideas that would not be expressed in response to a written list of discovery questions).

Data Analysis

Beyond the stakeholder interviews, SNQ's process for fully understanding the business processes at hand also involves:

- Collecting discovery questionnaires and supporting documentation.
- Gaining access to and analyzing internal spreadsheets, forms, and other data collection/management systems (including the current CRM, if applicable).
- Analyzing existing data to forecast potential clean-up and/or migration concerns.
- Conducting interviews with other stakeholders, knowledge keepers, and/or decision-making influencers (including CRM software representatives for vetting purposes and peer organizations for comparison purposes).

In the cases where an existing CRM is in play, SNQ strategically evaluates the following factors:

- How the CRM is currently being used (features and functionality).
- The overall user perception of the current CRM instance.
- Number of CRM licenses compared with number of active CRM users.
- What users like about the current CRM instance.
- What users would like to see improved in a future CRM instance.
- From a best practices standpoint, what areas are being leveraged successfully in the current CRM instance.
- From a best practices standpoint, what areas should be leveraged differently in the future CRM instance.
- What went well in the original CRM adoption/launch process.
- What could be improved in the future CRM adoption/launch process.

We'll elaborate more on these factors at the end of this document.

Process Confirmation

Lastly, SNQ's process concludes with presenting our findings to the key project stakeholders for review and feedback or confirmation.

As mentioned in the Executive Summary, the following sections of this document cover the following:

- **Existing Environment** – A summary of the current personas, processes, and technology.
- **New CRM Requirements** – A list of the identified requirements that a new CRM must meet, serving as a checklist for the selection and implementation/launch processes.
- **Project Strategy / Next Steps** – A cumulative analysis of current ecosystem, the future CRM implementation/launch process, as well as additional strategic observations (specifically related to non-CRM-related areas of opportunity, cultural adoption, and proactive risk mitigation sensitivities).

EXISTING ENVIRONMENT

Technology & Environment Overview

EXISTING SYSTEMS AND APPLICATIONS

Current CRM Usage

LACI currently uses Salesforce.com (also referred to as Salesforce, SF, or SFDC) as their CRM platform; however, employees are only using Salesforce for basic tasks. The CRM implementation has gone through several incomplete attempts to have additional features built out.

Past implementation resulted in poor adoption due to employee turnover (including at the executive level, creating directive challenges) as well as a general lack of internal knowledge of Salesforce best practices – both at a system administration level but also at an end-user level (due to lack of training and roll-out/adoption strategy).

The primary Salesforce features currently being used are:

- Account Tracking
- Contact Tracking
- EIR Assignment
- Activity/Note Tracking (Chatter)
- Form Integration (however, no updates are made to the data once in Salesforce)
- Classic View (nearing end-of-life and will require migration to Lightning)

System Breakdown

Tool	Process	Purpose	Used By	Strategy	CRM Feature
4 Degrees	N/A	Automates follow-up at certain time increments	UI	Integrate with CRM	Accounts & Opportunities
Adobe Sign	N/A	Used through Ironclad for obtaining signatures on agreements	L&C, Dev	Integrate with CRM	Accounts
Bridges	N/A	Booking conference rooms	All		
	N/A	Campus communications	Campus member s	Import to CRM (Future)	Customer Portal
Cafe	AIR Application Form	Capture applicant information for AIR program	EC	Integrate with CRM	Leads

Tool	Process	Purpose	Used By	Strategy	CRM Feature
Dropbox	N/A	Upload and store documents (some using for working documents, others using for final files only).	All	Integrate with CRM	File Sync from specified DB Folders.
Eventbrite	Event Registration	Track RSVPs for LACI events and money coming in (ticket sales).	MarCom , Dev	Integrate with CRM	Contacts, Leads, Opportunities
	Group Tour	Reserve a time for groups of 5-25 people to tour the facility.	MarCom	Integrate with CRM	Leads or Cases
	Individual Tour	Reserve an individual spot to tour the facility.	MarCom	Integrate with CRM	Leads or Cases
Excel	Success Metrics and KPIs	Capture data and relevant metrics for pilot programs.	MT	Import to CRM	Impact Metrics
Expensify	N/A	Track and submit expense reports.	All		
Formstack	LKIC Member Application	Application for membership at the campus (integrated with Ironclad).	L&C	Integrate with CRM	Leads
	Campus Event Request Form	Intake information for interest in campus use for events.	L&C, F&E, MarCom	Import to CRM	Leads or Cases
Gmail	N/A	Communication, listserv distribution groups.	All		
Google Calendar	N/A	Create reminders for reporting, follow ups, and events.	All		
Google Chat	N/A	Internal instant messaging.	All		
Google Drive	N/A	Store and share documents between program members and across the organization.	All	Import to CRM	File Sync – Consolidate with Dropbox

Tool	Process	Purpose	Used By	Strategy	CRM Feature
Google Forms	APC Fellowship Application	Collect data for APC Fellowship applicants per cohort.	EC	Integrate with CRM	Accounts, Contacts, Leads
	FBA Application Form	Collect applicant information for FBA.	UI	Integrate with CRM	Accounts, Contacts, Leads
	Participation Agreement	Collect agreement and consent from FBA participants.	UI	Integrate with CRM	Accounts, Contacts
	Job Forms & Metrics	Collect information about company growth for all LACI startups.	UI	Integrate with CRM	Accounts, Contacts
Google Sheets	Development Dashboard	Track donor pipeline, renewals, prospect status, and projected/actual budgets.	Dev	Import to CRM	Accounts, Contacts, Opportunities
	Community Matrix	Log Contacts/ Organizations, Program Types, and Population and Communities served.	EC	Import to CRM	Accounts, Contacts
	TCC Reporting Requirements	Project tracking – tasks, timeline, owner, budget.	EC	No Change	
	Reporting Metrics	Output tracker for grant/program reporting.	EC	Import to CRM	Impact Metrics
	Fundraiser Pipeline	Summarize donors, forecast totals for fundraisers, track guest list, and organize tasks.	Dev	Import to CRM	Accounts, Leads, Opportunities
	Corporate and Institutional Contacts	Manage contacts and relevant information.	All	Import to CRM	Contacts, Leads,
	Grant Proposal Planning	Identifies status of grants and probability of winning award.	Dev	Import to CRM	Opportunities
	Grant Reporting	Tracker outlining grant contacts, deliverables, and project schedule.	L&C	Import to CRM	Impact Metrics

Tool	Process	Purpose	Used By	Strategy	CRM Feature
	Recruitment Magnum Opus	Recruitment and program tracking and monitoring for startups.	UI, MT	Import to CRM	Contacts, Accounts, Leads, Opportunities
	Innovators Magnum Opus	Reporting and tracking for innovators.	UI	Import to CRM	Contacts, Accounts, Leads, Opportunities
	Startups Calendar	Track check-ins and milestones for startups.	UI	Import to CRM	
	PC Dashboard	Track onboarding/ offboarding, company info and contact record, and metrics collection, A/R, and relevant contracts.	UI	Import to CRM	
	Market Access Dashboard	Tracking for both pilot and market access programs and funding.	MT	Import to CRM	Accounts, Cohorts
	Member Management	Master sheet of sub-users and accounts.	F&E, Finance	Import to CRM	Accounts, Contacts, Cohorts
	Master Member List	List of every person assigned to work in the building by company and key card information.	F&E, Finance	Import to CRM	Accounts, Contacts, Cohorts
	Vendor Tracker	Track all vendors used on campus.	F&E	Import to CRM	Accounts, Contacts
Google Slides	Dream Team List	Identify ideal prospective partners for programs.	Dev, EC, MT	Import to CRM	Accounts, Opportunities, Leads, Contacts
Ironclad	Sub-user Agreement	Contract to give user access to work on the premises.	L&C	Integrate with CRM	File Sync – Store Final Documents
	Campus Use Agreement	Contract allowing a portion of the campus to be used for an event.	L&C	Integrate with CRM	File Sync – Store Final Documents
	APC Agreement	Contract granting permission for user to access and use APC.	L&C	Integrate with CRM	File Sync – Store Final Documents

Tool	Process	Purpose	Used By	Strategy	CRM Feature
	Independent Contractor Agreement	Contract outlining work agreement for independent contractors.	L&C	Integrate with CRM	File Sync – Store Final Documents
JazzHR	N/A	Applicant and recruitment tracking.	L&C		
MailChimp	N/A	Design and send email communications with list segments.	MarCom	Integrate with CRM	Leads, Contacts, Campaigns
Namely	N/A	Securely store employee records.	L&C		
Paylocity	N/A	Payroll time tracking.	All		
PayPal	N/A	Collect sponsorship funds.	Dev, Finance	Integrate with CRM	Accounts, Contacts, Opportunities
Pitchbook	N/A	Identify and track investors.	UI	Integrate with CRM	Contacts, Leads
Plannable	N/A	Planning and scheduling social media posts.	MarCom		
QuickBooks	N/A	Generate invoices and track revenue.	Finance		
Safety Spot	N/A	LMS to provide safety training modules for APC members and track key card numbers.	EC, L&C, F&E		
Salesforce.com	N/A	Take notes for innovator and incubation companies.	UI		
Slack	N/A	Internal instant messaging and project coordination.	All (Primary: UI)		
Survey Monkey Apply	Incubation, Market Access Track, and Innovators Application	Intake information from startups interested in incubation program.	UI	Integrate with CRM	Contacts, Leads, Accounts

Tool	Process	Purpose	Used By	Strategy	CRM Feature
	Incubator Scorecard/ Rubric	Eligibility criteria and final interview score.	UI	Integrate with CRM	Contacts, Leads, Opportunities, Accounts, Impact Metrics
Survey Monkey	Pilot Data Collection	Pre, during, and post surveys to collect pilot data for metrics	MT	Integrate with CRM (possibly replace data collection tool)	Impact & Pilot Metrics
	Event Feedback	Post event survey to help improve future events	MT	Integrate with CRM (possibly replace data collection tool)	Quality Metrics
Task Ray	N/A	Task management.	UI	Uninstall from SFDC	Use Native Task Management Features.
Urban Leap	Pilots Application Form	Track RFP/Qs submitted and company responses.	EC, UI, MT	Import to CRM	Accounts, Contacts, Cohorts
Welkio	N/A	Track incoming visitors to the campus.	Dev, F&E, MarCom	Import Data to CRM (Optional)	

Personas & Associated Workflows

PRIMARY PEOPLE INVOLVED IN CRM WORKFLOW

Fund Development

The purpose of the Fund Development (also referred to as Development, or Dev) team is to raise money for general operating support & LACI programs. Development prospects funding opportunities, establishes new relationships, retains existing partners, and strategizes for financial growth of the organization overall.

Ownership & Stewardship

This section summarizes the people, goals, and performance management of the LACI department:

Key Project Personnel

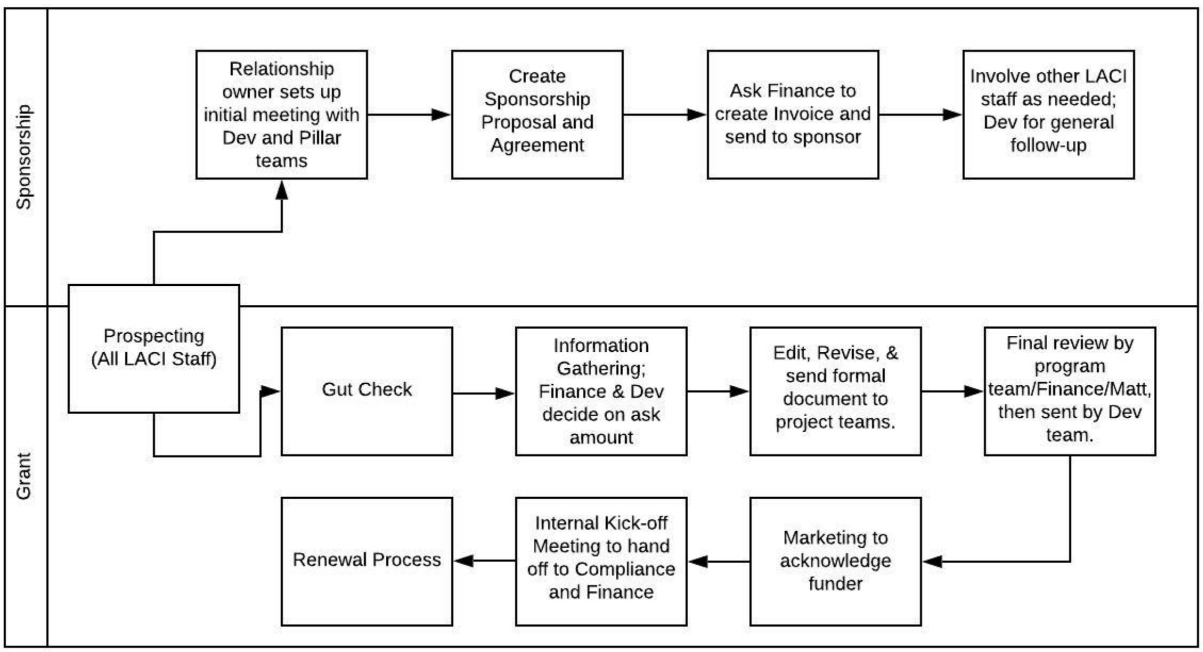
- Jillian Misrack – Vice President
- Barbara Wise – Grant Proposal Manager
- Forrest Lee – Development Associate

Opportunities for Improvement

- A system that is flexible enough to gather data from and track grants, contracts, corporate sponsors, etc. – all in one place. Currently need to separate because data sets are not aligned.
- A place needed to immediately find out if/when/what action has been taken (i.e. whether an agreement has been signed) rather than asking others.
- A proper way to delineate how much a sponsor has given, what programs they've sponsored, and when their renewal is coming up.
- Easier methods of reporting, tracking, and streamlining the workflow.
- Increase accuracy and speed of numbers (income) tracked to increase donor retention, increase overall donations, and strategize cultivation plans for each donor and funder.
- Automatic and manual methods for assigning a Relationship Manager to accounts and contacts.
- Ability to track number of touches to convert leads so this metric can be tracked and improved on.
- Methodology for cultivating better engagement with leads as well as accounts and contacts (specifically a more automated process for warming up an account or contact leading up to renewal).
- Use Mailchimp data to feed more funding opportunities.
- Use Welkio data to feed more funding opportunities.
- Plug-in for grant opportunities to be searched (foundations, local, state, and federal).

- Better, more automated processes for payment acknowledgements between both individual donation as well as corporate and grant funding.
- Track payment receipt dates (particularly for funding that could be considered for renewal which should ideally be processed in a timely manner).
- Visibility into lifetime value of funding sources.

Existing Workflow



Enhancing Community

The Enhancing Community (EC) team is focused on ensuring that underrepresented groups are engaged at every cleantech stage: from ideation (via Women in Cleantech [WICT] Program) to workforce (via APC Fellowship Program) to deployment (via pilot deployments in disadvantaged communities).

In addition, EC also administers LACI's Artist-In-Residence (AIR) Program to connect the dots around artists, technology, and sustainability.

The team also oversees issues, events, and initiatives related to workforce development, community engagement, and Diversity Equity and Inclusion.

All matters are first brought to the attention of Estelle Reyes, LACI's SVP of Enhancing Community, and then assigned to appropriate EC team members.

Ownership & Stewardship

This section summarizes the people, goals, and performance management of the LACI program:

Key Project Personnel

- Estelle Reyes – Senior Vice President
- Jose Hernandez – Community Engagement Manager
- Daniel Ferguson – Director of Workforce Development
- Debra Scacco – Program Director, Artist in Residence
- Sharon Segado – Training Coordinator

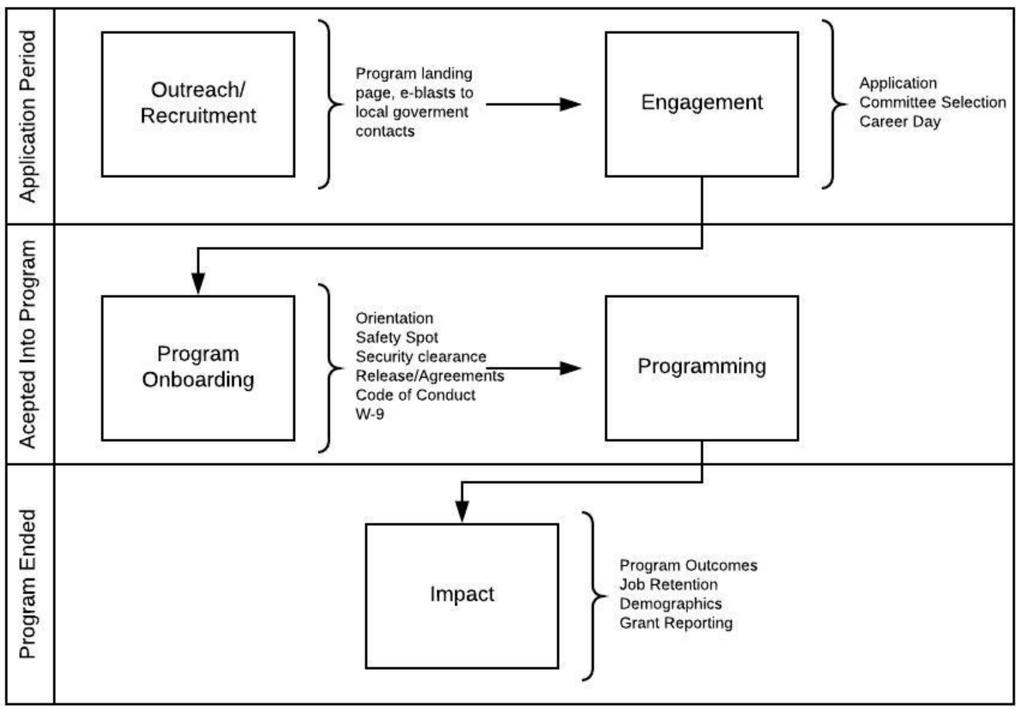
Opportunities for Improvement

- Have LACI staff communicate with campus users through their existing emails instead of creating a new LACI email account.
- Scope the training needs of all LACI teams and schedule trainings/workshops accordingly. Training should be streamlined across all programs.
- Create a platform that fits most, if not all, needs, specifically as it pertains to program applications across the organization.
- There need to be systems/templates in place for managers that engage with specific audiences to be able to draft Mailchimp newsletters themselves, or with minimal oversight from the Marketing Team.
- User-friendly way to submit job requests and adequate staffing allocated to the process.
- Need solution for important/time-sensitive technical problems that go unresolved for too long. There is no clear/straightforward process to get technical problems into a queue and resolved ASAP.
- Need solution for SafetySpot – user interface (very difficult to navigate). If you book equipment, it does not let you cancel last-minute online. Records of completed trainings are lost, meaning users have to repeat training in order to

book equipment. Consider exploring a different learning management system (LMS) that better fits the team's needs.

- Need solution for Bridges – LACI staff is required to use the Bridges platform in order to book a conference room; however, Bridges does not allow you to cancel last-minute. Therefore, others interested in using the same room may not be made aware that the room is now available.
- Universal communication platform (G Chat vs Slack vs email).
- Standardization for account types and terminology/categorization in a CRM.
- Visualization of geographic data in a map format.

Existing Workflow



Unlocking Innovation

The Unlocking Innovation (UI) team provides daily support to four programs: Incubation, Market Access, Innovators, and Founder's Business Accelerator.

UI is responsible for recruiting candidates into these programs, day-to-day operational and administrative tasks, planning workshops, collecting company metrics, grant reporting, planning and teaching curriculum, etc.

The UI team also facilitates Executives in Residence (EIR) who provide one-on-one coaching to LACI startups and offer advice on subjects including investment and business strategy.

Additionally, UI manages relationships with the investment community, which is a key customer set.

Ownership & Stewardship

This section summarizes the people, goals, and performance management of the LACI program:

Key Project Personnel

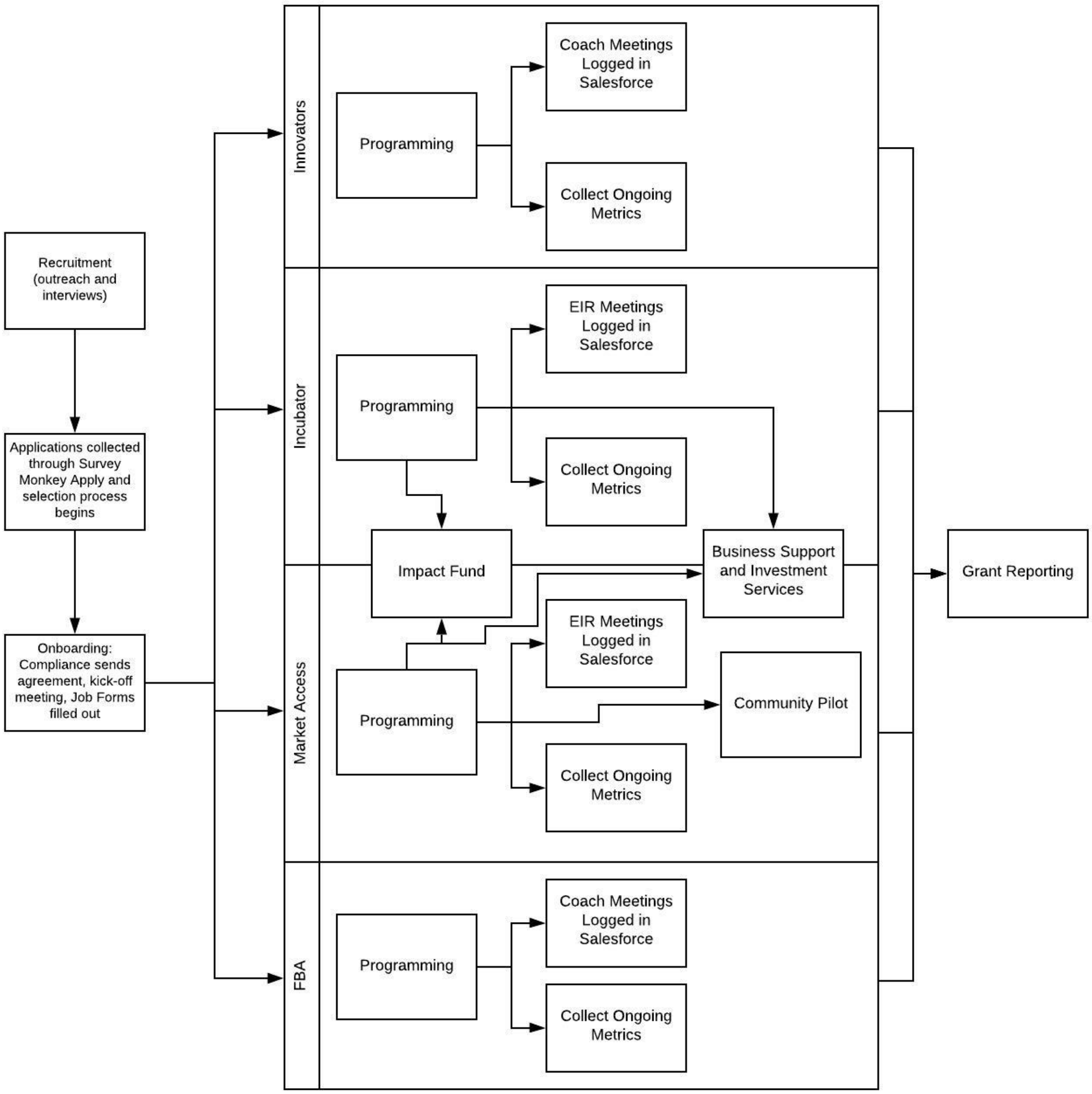
- *Emily Björklund Drake – Senior Vice President*
- Georgina Walker – Pipeline Coordinator
- Darien Siguenze – Program Coordinator
- Taj Ahmad Eldridge – Senior Director of Investment
- Todd Hitomi – Project Manager, FBA
- Bob Musselman – Lead Executive in Residence (EIR)
- Adriana Embus-Figueroa, Fund Management Analysis

Opportunities for Improvement

- Company accounts – must be able to include the lifecycle of the company including activity, alumni, and terminated. Must also indicate the program (innovators, incubation, etc.).
- Need to streamline metrics collection so that the data goes into the CRM.
- Must be able to run reports on metrics and company information for grant reporting.
- Easy method for notetaking and tagging other team members.
- Store job forms/other grant reporting requirements in the CRM.
- Seamless transition of information and data from the application and selection through onboarding and programming.
- Central collection of all application and selection materials.
- Tracking of lead status and application status.
- Track usage of Business Support Services – meetings that companies have with service providers, notes from service providers, any outstanding A/R.
- SurveyMonkey Apply integration with the CRM.
- Deeper task management enablement.

- Personalized default views (for example, make Chatter the default view for EIRs due to their emphasis on notetaking).
- Customized page layouts to better highlight the most important information.
- Incorporate all lending and investing history into accounts and contacts.
- Simplified method of compiling notes on accounts and contacts for audit and grant reporting purposes.
- Ability to convert a company from Lead to Applicant to Active Company to Alumni within the CRM.
- Ability to progress a company from one program to the next within the CRM.
- Email communication integration as current BCC process is clunky.
- Overall, leverage the CRM more fully, specifically as it pertains to holistic lead nurturing (leads are currently configured to be private) and account/contact management (currently using the CRM primarily for notetaking).

Existing Workflow



Market Transformation

The Market Transformation (MT) team works with industry and the public sector to accelerate system change on key initiatives across transportation and mobility, energy, and sustainable cities.

Classically, this might be considered "Programs and Partnerships". In this case, MT partners with governments, corporations, and startups, as well.

Ownership & Stewardship

This section summarizes the people, goals, and performance management of the LACI program:

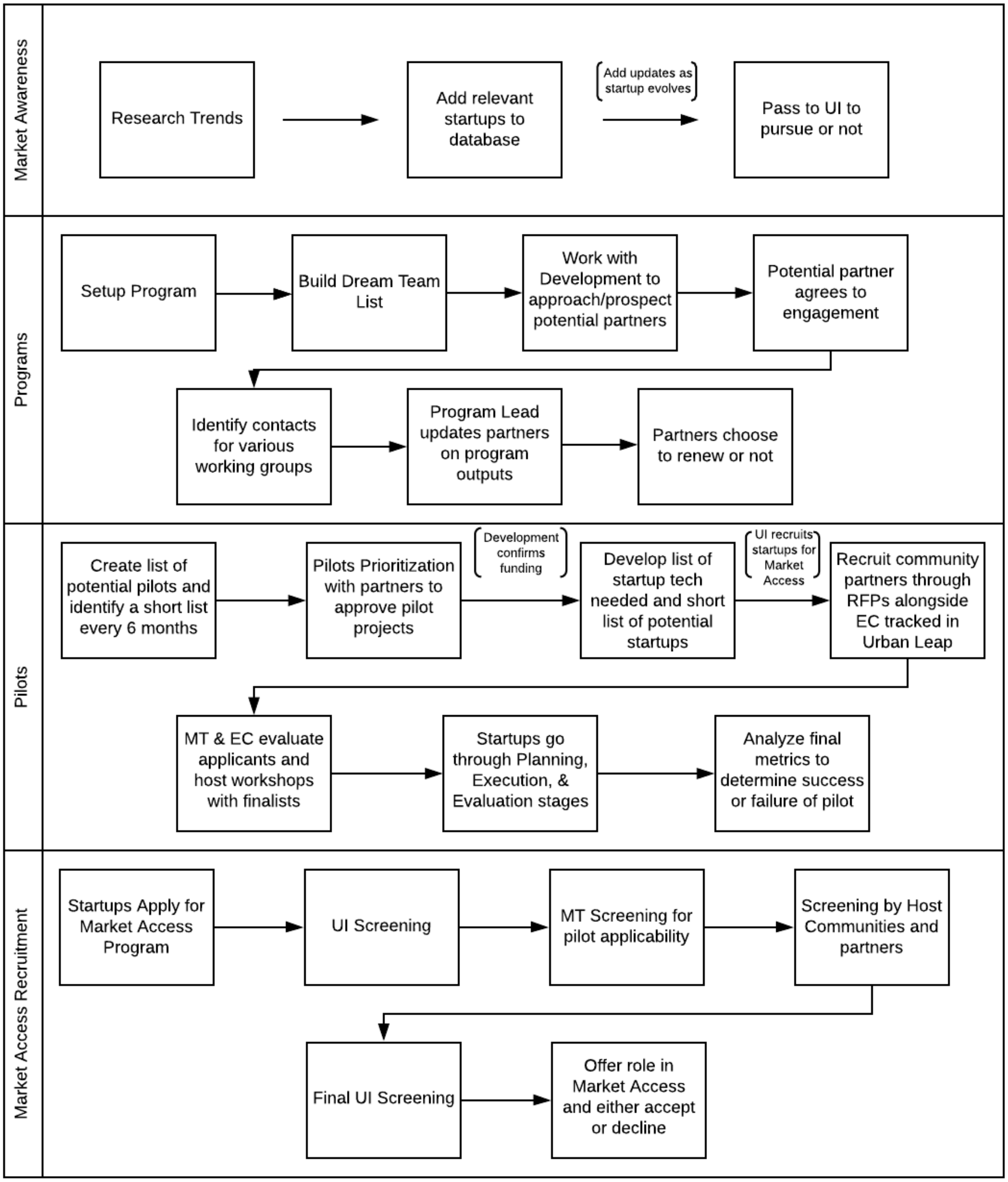
Key Project Personnel

- Alex Mitchell – Senior Vice President
- Kelly Schmandt Ferguson – Director

Opportunities for Improvement

- More consistent use of the CRM for storing information about governments, corporations, and startups.
- Linkage between the CRM and the pilots tracking platform (Urban Leap).
- Email integration – ability to invite people to events based on tagging/characteristics in the CRM.
- Email integration – ability to tag startup/partner for introduction email (e.g. BCC crm@laci.org and that will automatically copy both the startup's and/or the partner's accounts).
- Ability to access event RSVP and attendance statistics at a contact and/or account level (historical, current, and future).
- Improve the startup reimbursement process in the Pilot program (currently a painful process).
- A method for streamlining and/or synthesizing all communication platforms (for example, currently updating pilot information in a daily log in Google Docs, a budget tracking spreadsheet in Google Sheets, a weekly update tracker in Google Docs, Salesforce, multiple Slack channels, and email).

Existing Workflow



Legal & Compliance

Although this is not an official department of LACI, Legal and Compliance (L&C) it is orchestrated through the following:

Contracts and Compliance (specifically its Director) falls under Operations and Finance while Legal (specifically its General Counsel) falls under the office of the CEO – both areas serve the purpose to provide Legal/Compliance support to LACI and its portfolio companies.

Ownership & Stewardship

This section summarizes the people, goals, and performance management of the LACI department:

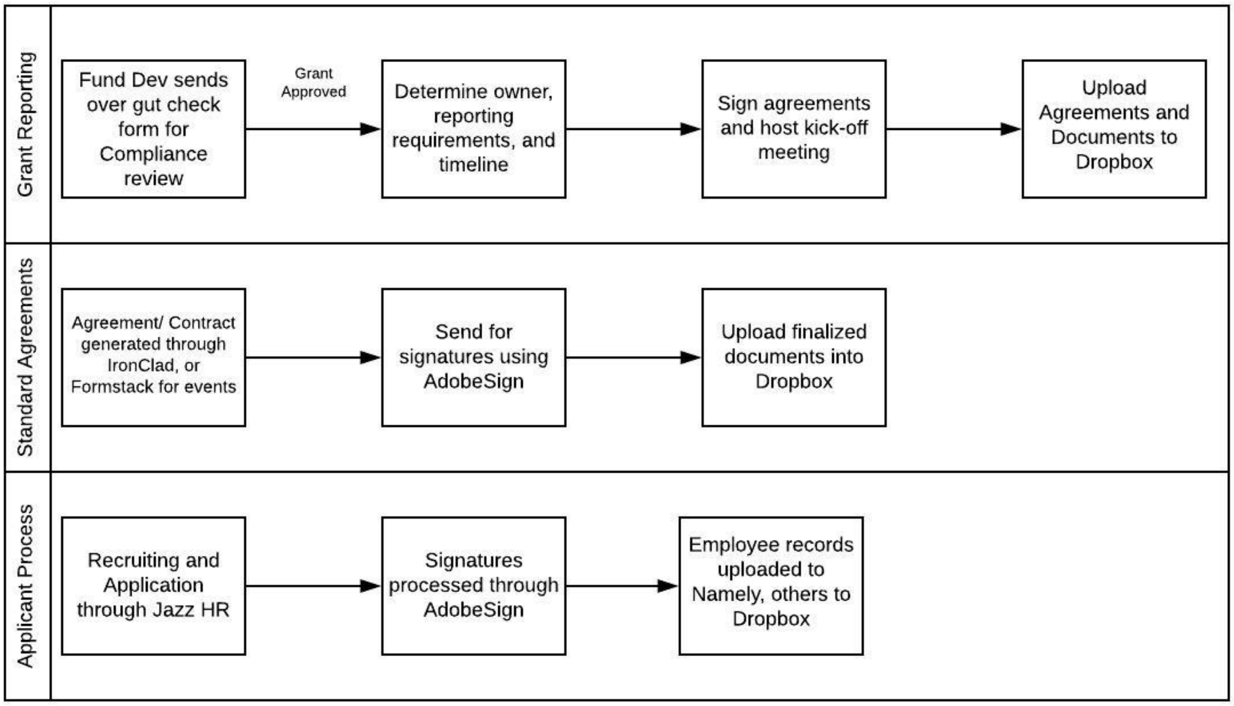
Key Project Personnel

- Anastasia Maier – General Counsel
- Shannon Wright – Contract and Compliance Director

Opportunities for Improvement

- A CRM that has integration capabilities with Ironclad.
- A CRM that has integration capabilities with AdobeSign.
- Adoption of a centralized document repository that is encrypted.
- Streamlined used of Dropbox across the organization (working documents vs final files only).
- Improved communication between LACI and non-LACI campus members (primarily using Bridges for this purpose currently).
- Visibility into where a project is in a timeline view (Gantt chart).
- More concrete account ownership (Relationship Managers and clear visibility into what accounts and contacts they're assigned to).
- For Facilities, adoption of a work order management/ticketing system.
- More automation around task assignments, follow-ups, and calendaring.
- Streamlined metrics and KPI tracking.
- Streamlined terminology internally.
- Shared goals and cross-departmental visibility to those shared goals.

Existing Workflow



Facilities & Events

The purpose of the Facilities and Events (F&E) team is to oversee all touch points related to the access and use of LADWP's La Kretz Innovation Campus, outside of LACI-organized events which are directed by the MarCom team.

The Facilities team acts as the Campus Management team and is a liaison between stakeholders utilizing the building and LADWP. The team is responsible for ensuring the campus is fully utilized and collaborating with other departments to increase billable time/utilization when needed. This is done through hosting events, renting desk or event space, and managing warehouse space capacity.

The Facilities and Events team primarily manages sub-user agreements for use of campus office space (also referred to as "hot desks"), use of the Colyton Warehouse, use of the Advanced Prototyping Center (APC), and external campus events and tours.

Ownership & Stewardship

This section summarizes the people, goals, and performance management of the LACI department:

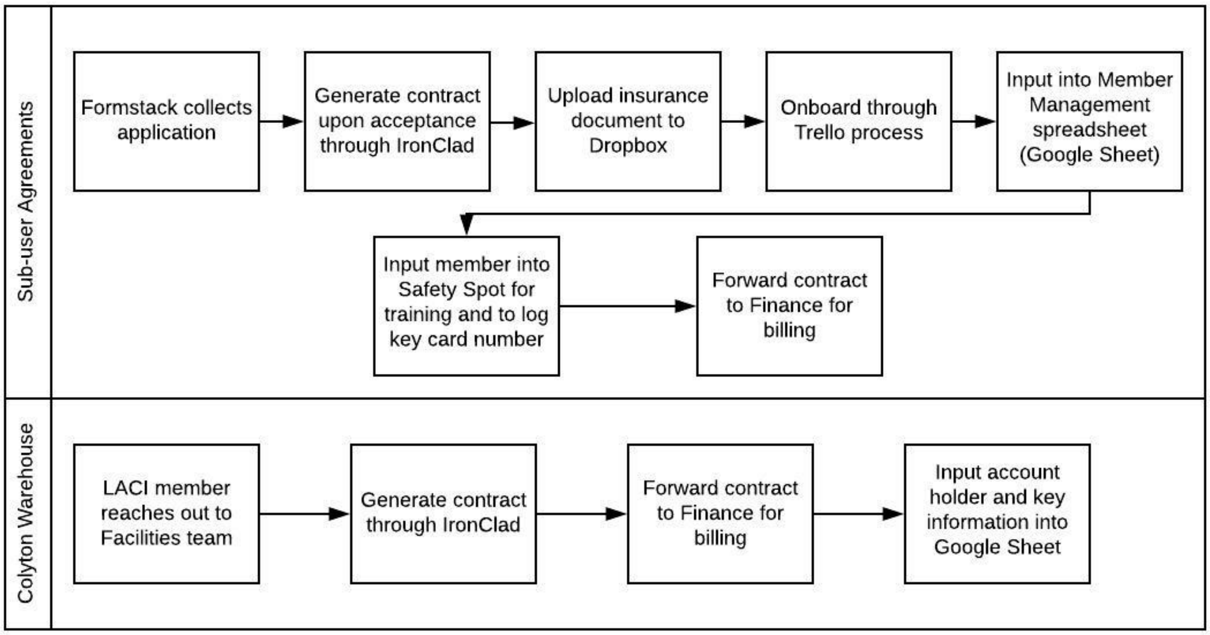
Key Project Personnel

- Stephen Hargett – Senior Director
- Evelyn Serrano – Coordinator

Opportunities for Improvement

- Streamline communication processes both internally and externally.
- Improve collaboration between teams by collecting information about accounts and contacts from across different sources and displaying that information in a consolidated location.
- Improve visibility to data across departments to maintain data integrity and ease of reporting.
- Establish a way to track the onboarding and offboarding processes by member and program.
- Create a centralized location for recording incident reports and tracking issue report outcomes.
- Ability to manage facility usage pipeline and revenue.

Existing Workflow



Finance

The purpose of the Finance team is to manage funding from various sources and ensure timely billing and payment to execute organizational goals.

Ownership & Stewardship

This section summarizes the people, goals, and performance management of the LACI department:

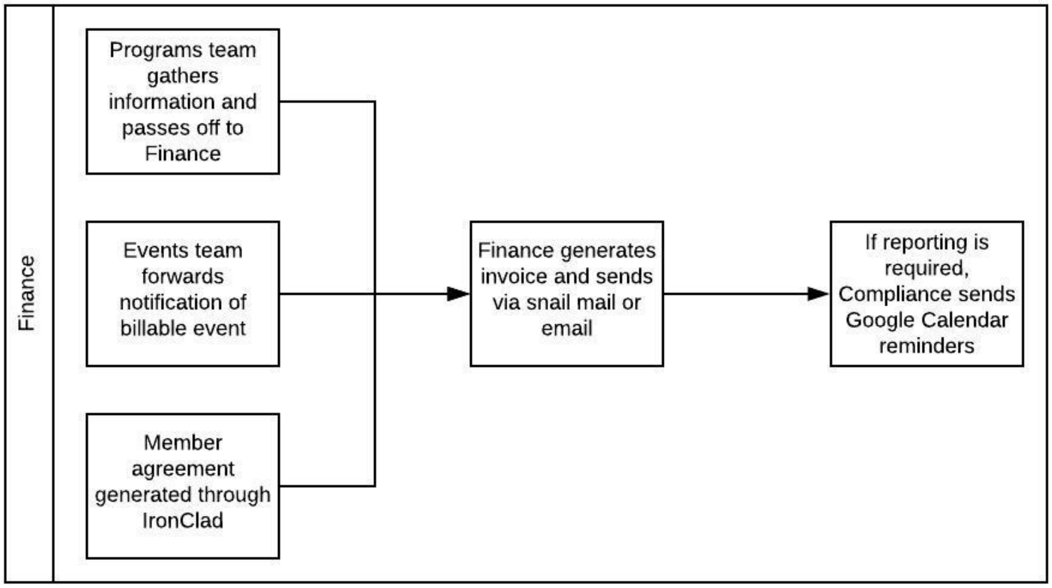
Key Project Personnel

- Ben Stilp – Executive Vice President
- Shawn Traylor – Manager
- Bryan Chinchilla – Coordinator

Opportunities for Improvement

- Visibility into any lead/account communication by the Fund Development team or any of the programs, specifically related to unsolicited donations.
- Ability to pull reports for donations made year-to-date.
- QuickBooks integration, if possible (so Development and Leadership teams can see balances owed by customers and contacts in the LACI network).
- Visibility into whether someone has been offboarded from campus or not (currently have to check with the Facilities team on terminated agreements).
- Solution for manual process of reaching out to vendors for W9 setup in QuickBooks.
- Any other QuickBooks integration functions (during transition from QuickBooks Online to desktop version).
- Improved coordination on A/P vendor invoices so they're passed onto the Finance team and paid in a timely manner (use of Bill.com?).
- Visibility into funder value for a certain period of time or lifetime value.
- Automated process for programs to access their A/R and outstanding balances reports.

Existing Workflow



Marketing & Communications

The purpose of the Marketing and Communications (also referred to as MarCom) team is to strategically develop the messaging around and shape the delivery of LACI's compelling mission and find new and creative ways to engage new and existing stakeholders, both internally and externally, in LACI's work.

The key pillars of this department are thought leadership, content creation and media/press relations, recruitment campaigns, and event management.

The current MarCom priorities are the office of the CEO, innovation, transportation, and workforce development.

Ownership & Stewardship

This section summarizes the people, goals, and performance management of the LACI department:

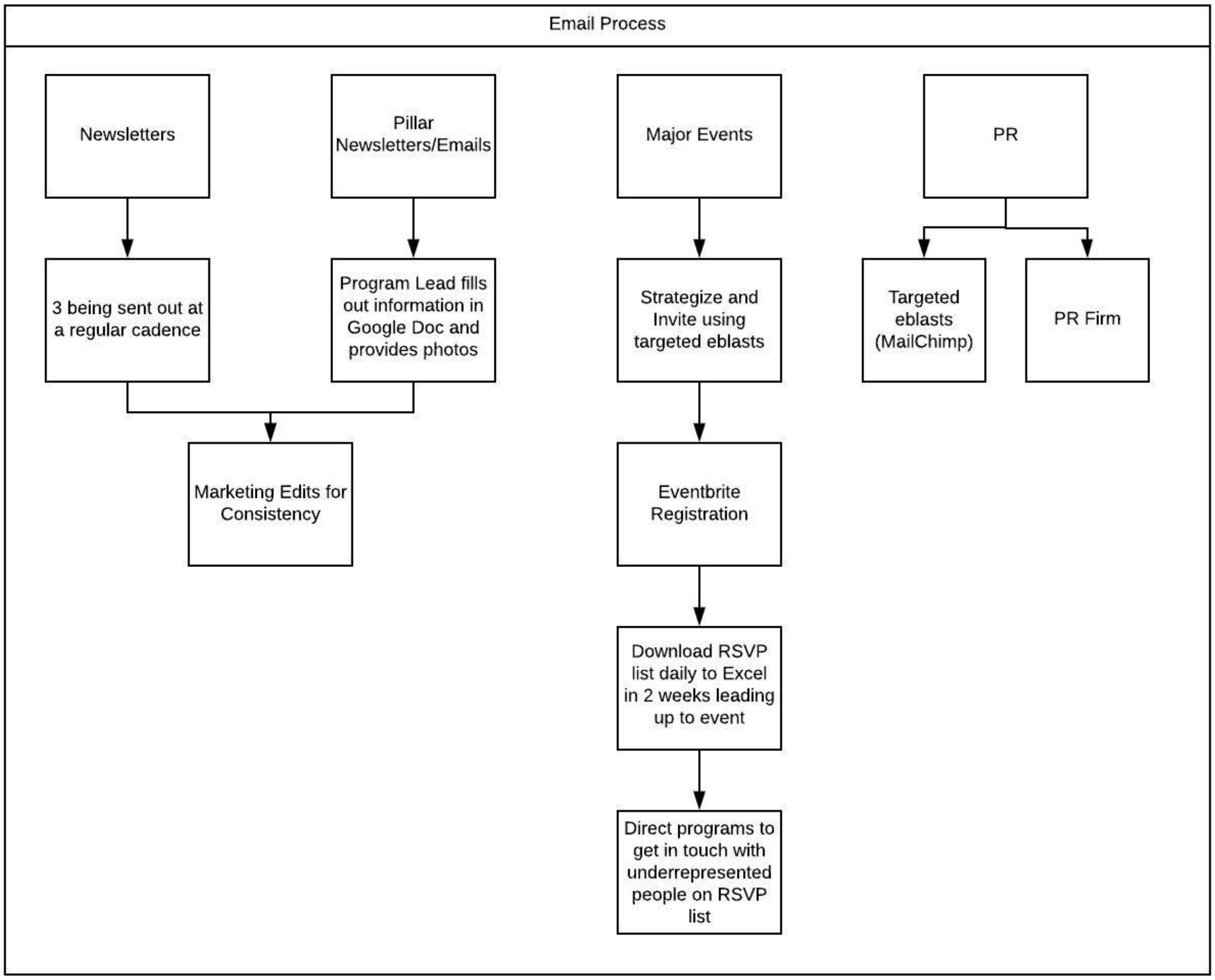
Key Project Personnel

- Sara Bryce – Vice President
- Clare Le – Senior Director

Opportunities for Improvement

- Ability to track accounts and contacts at a field-level, specifically the following data points:
    - Program Status (applied, active, complete, etc.)
    - Alumni Network (active or inactive in events)
    - Zip Code
    - Social Media Handles (per channel)
- Adoption of an opt-in on the front desk sign in system to leverage existing contacts/data and further grow LACI's newsletter list. This would require replacing Welkio with a system that allows for integration or easier data export.
- Addition of a newsletter opt-in pop-up on the website (WordPress).

Existing Workflow



IT

LACI's IT leadership has recently transitioned from its previous internal Director, Joe Crowley, to its current external contractor, Frontline (led by CEO, Shane Purcell).

The current IT support infrastructure is intended to serve LACI with a help desk system for reporting technical issues as they arise. Frontline administers support via remote device access and is working with LACI's operational leadership on strategic technology planning on a moving forward basis.

Ownership & Stewardship

This section summarizes the people, goals, and performance management of the LACI department:

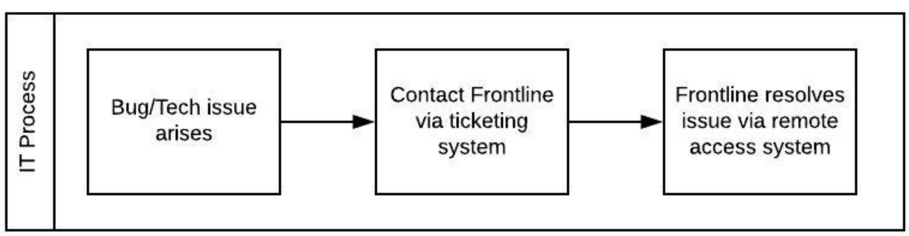
Key Project Personnel

- Shane Purcell – CEO, Frontline (external contractor)

Opportunities for Improvement

- Ensure organization is aware of help desk system and connection with Frontline to address IT needs as they arise moving forward.
- Implement data back-up solutions to eliminate potential risks down the road.
- More widespread training and communication across all teams to promote systems alignment and knowledge.
- Implement a cohesive technology strategy to eliminate technology sprawl and establish technology best practices across the organization.

Existing Workflow



NEW CRM REQUIREMENTS

CRM Feature Requirements

MAJOR FEATURES PRIORITIZED BY DEPARTMENT

Outside of the office of the CEO, LACI is comprised of nine principal departments that are both independently and collaboratively responsible for LACI's goals, processes, and data management. As part of the adoption of a consolidated CRM system, LACI will leverage core features of a CRM for their individual and collective needs.

Fund Development

The matrix below outlines how a CRM should be used by each team. Prioritization is on a scale of 1 through 5 where 1 is the highest priority and 5 is the lowest priority.

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Lead Management	Capture Leads through Website	Ability for contact and web form submissions to be automatically captured in CRM.	All Leads by Source	2
	Lead Assignments	Leads can be assigned to reps to nurture into donors.	Lead Assignment by Rep	2
	Activity Tracking	Ability to track calls, emails, and other activities related to prospective donors.	Activity by Rep Tracking	2
	Lead Conversion	When a prospect displays enough interest, they can be converted into an Account, Contact, and Opportunity.	Lead Conversion Metrics by Rep	2
	Import Leads	Ability to import lead lists that are gathered from events or Welkio exports. **Welkio integration currently not available.**		2
Donor Prospects (Leads)	Donor Profile Creation	A prospective donor profile is created using company and contact data. This prospective donor is used when there is no relationship established with the donor and outreach		3

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
		activities/nurturing is in progress.		
	Donor Profile Conversion	Once a prospective donor is qualified, the prospect is converted into an Account and Contact.		3
	Donor Profile Queue	Prospective donor profiles are placed in a queue. The queue can be used to sort leads by status, potential value, etc.		3
	Donors Source & Campaign	Ability to track the donor leads source and associated marketing campaign.		3
Accounts and Contacts	Track Companies by Type	Ability to track company data by different relationships / types to LACI (Partners, Grantors, Portfolio Companies, etc.)	All Accounts by Type	1
	Track Activity	Ability to track calls, emails, and meetings associated with the company.	Report - All Activity with Details Report - Last Activity Date greater than 90 days	1
	Track Revenue for Company	Ability to see all revenue (opportunities) associated with the company.		1
	Track all Cohort Participation	Ability to track and review all cohort participation (past and present) within the incubator, innovator, and pilot programs.		1
	Track Open AR (Future)	Ability to see open A/R invoices or customer balance.		4
	Search a Contact	Search for contact in an Account.		1
	Follow Up Task Reminder	Create a Follow Up Task Reminder.	Task Reminder	1
Opportunity / Pipeline Management	Organization Type	Ability to track the organization type on the	Report - Revenue by Organization Type	1

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
		opportunity (account, contract, or individual donor).		
	Revenue Source Type	Ability to track if the revenue is corporate, government, or individual.		1
	Opportunity Type	Ability to track the type of opportunity (Sponsorship, Grant, Contract for Hire, Campus Desks, Campus Events, Donation).	Report - Revenue by Type by Program	1
	Pipeline Stage	Ability to track what stage / status the opportunity is in (Prospect, Qualified, Negotiating, Renewal, Contract, Closed Won, Lost).	Report - Revenue by Pipeline Stage	1
	Forecast Confidence	Assign a confidence percentage to each pipeline stage to represent the likelihood of the opportunity closing.		1
	Program Type	Associate Revenue to Specific Programs & Sub Programs (Example: Pillars and APC Fellowship)	Report - Revenue by Type by Program	1
	Close Date / Year	Ability to track the date the opportunity closed and use the date in yearly budgets / projects.	Report - Annual Revenue Forecast / Budget	1
	Activity Tracking	Ability to track calls, emails, and outreach related to opportunities.	Report - Number of touch points per opportunity close	1
	Opportunity Ownership	Ability to assign an account manager / owner to the opportunities. This will assign the owner of the relationship and who should be contacting the primary contacts.	Report - Revenue by Owner	1

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
	Sales Cycle Length	Track the time it takes from creation date to close date on opportunities.	Report - Average Sales Cycle (in days)	1
	Contract Tracking	Track the renewal date (or end date) for contracts. Review contracts that are ending within the upcoming quarter.	Report - Contracts Renewing This Quarter	1
	Automatic Renewal Workflow	Automatically clone previous contract opportunity 90 days before contract end date to allow sales team to begin outreach on the renewal process (set new opportunity stage to renewal).	Report - Contracts Ending by Month	1
	Forecast	Ability to create reports to forecast / budget revenue through the current year.	Report - Annual Revenue Forecast / Budget	1
	Deal Alerts	When large / important opportunities are closed, a notification is sent to senior management and marketing (for press release).	Email - Deal Alert	3
Grant Revenue (Opportunity Type)	Create and Edit Grants (Opportunities)	Opportunities will track potential revenue through the grant application process. The grant submissions can be used for revenue forecasting.	Total Grant Revenue by Source	1
	Track Tasks and Milestones	Track tasks and milestones related to the grant application process and post-award reporting. Tasks can be assigned to multiple people within the organization, a queue, or just the Fund Development team.	Task by Grant by Month	1
	Grant Deliverables	Create a list of requirements for reporting and funding.		1

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
	Grant Stages	Ability to track grant submission stages (different than pipeline).		1
	Ask / Award Amount	Track the ask and award amount for each grant. This is tracked as dollar value and type (cost share / match, etc.).		1
	Priority	Ability to set priority to each grant opportunity.		1
	Grant Submission Details	Ability to add links / URL to track for submission.		1
	Approval Process (Gut Check)	Automatically send email notifications with grant information to approve / review (gut-check process) for grants exceeding $25k.	Email - Approval	1
	Approval Process (Final Submission)	Final submission / approval of documents.	Email - Approval	5
Donation Revenue (Opportunity Type)	PayPal Donations	Donations are tracked as opportunities in CRM (automatically from PayPal or another tool). Donations are tracked as one-time or recurring gifts. *This would be a custom developed process. There are other donation platforms that do integrate with SFDC.*	Report - Donations by Type (One-time vs Recurring) Report - Lifetime Donor Contributions Report - Top 50 Donors	4
	Donation Acknowledgement	An email containing a donation receipt is sent to donor.		3
	Yearly Donation Forecast	Ability to see a donation forecast for the year by donor. As donations are collected, the forecast status is updated to closed.	Yearly Donation Forecast	4

Enhancing Community

The matrix below outlines how a CRM should be used by each team. Prioritization is on a scale of 1 through 5 where 1 is the highest priority and 5 is the lowest priority.

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Lead Management (Applications)	APC Application Forms	Ability for contact and applications submissions to be automatically captured in CRM.		1
	APC Application Status	Track applications through statuses while going through the review/acceptance process.		1
	Activity Tracking	Ability to track calls, emails, and other activities related to prospective members.		2
	Accepted Candidates	Accepted Candidates will be converted into Accounts/Contacts in order to segment active APC Fellows with previous applications.		1
	Invite Previous Applicants	Ability to mass email previous, unaccepted candidates to reapply to future programs.		3
Accounts and Contacts	Fellowship / AIR Cohorts	Accepted candidates will be assigned to a cohort / alumni group.		1
	Onboarding Checklist	A task list is automatically created with steps to complete fellowship / AIR onboarding tasks (acceptance forms, APC training, setup in SafetySpot, etc.).		3
	Offboarding Checklist	A task list is automatically created with steps to complete fellowship / AIR offboarding tasks.		3

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
	Partner Management	Track community partners' contact information and program types.		1
	Partner Contact	Ability to track contact information for key contacts related to partners.		1
	Partner Mission	Track population served, community served, and notes.		1
	Track All Cohort Participation	Ability to track and review all cohort participation (past and present) within the incubator, innovator, and pilot programs.		1
Cohort Management	Create Cohorts	Ability to create a cohort with information about the program type, start and end dates, and associated program information.		1
	Cohort Types	Ability to track cohort types (APC vs AIR).		1
	Add Fellowship / AIR	Associate contacts with the cohorts.		1
	View Fellowship / Alumni List	View list of cohort members.	Report - All Cohort Members Report - All APC Alumni	1
Opportunities	EC Pipeline	Review forecast / budget from Fund Development.	Report - Revenue by Type for EC	4
Impact Metrics	Create New Metrics	Ability to create new questions or metrics that need to be tracked. The metrics will have categories, question format, and question text.		3
	Group Metrics in Templates	Reuse metrics questions from across all grants or other departments and create a template specific to needs for grant or program.		3

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
	Assign Templates to Grants	Ability to associate template to grant and view required questions for each grant.		3
	Assign Templates to Cohorts	Associate the template with cohorts to be used when sending surveys.		3
	Send Impact Metrics as Surveys	Use mass email tool to send cohort members surveys required for specific program.		3
	Collect Impact Metric Data	All data collected in survey should be associated with contact, account, cohort, and grant.		3
	Centralize Impact Metric per Cohort / Program	Ability to create reports and dashboard of aggregated impact data per cohort or program. The dashboard can be used as a quick reference when filling out grant reporting forms.	Report- Impact Metrics by Grant Dashboard - Impact Metrics (Filtered by Grant or Program)	3

Unlocking Innovation

The matrix below outlines how a CRM should be used by each team. Prioritization is on a scale of 1 through 5 where 1 is the highest priority and 5 is the lowest priority.

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Lead Management (Applications)	FBA / All Programs	Ability for contact and applications submissions to be automatically captured in CRM.		1
	Applicant Sync	Ability for contact and application submissions to be automatically synced to CRM from SurveyMonkey Apply.		1
	Applicant Status	Track applications through statuses while going through the review / acceptance process.		1
	Activity Tracking	Ability to track calls, emails, and other activities related to prospective members.	Report - All Meeting Notes by Account	3
	Accepted Candidates	Accepted candidates will be converted into Accounts / Contacts to separate candidates from those accepted into programs.		1
	Invite Previous Applicants	Ability to mass email previous, unaccepted candidates to reapply to future programs.		4
Accounts and Contacts	Program Cohorts	Accepted candidates will be assigned to a cohort / alumni group.		1
	Onboarding Checklist	A task list is automatically created with steps to complete participant onboarding tasks (acceptance forms, APC training, setup in SafetySpot, etc.). Tasks are specific to each department.		3

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
	Offboarding Checklist	A task list is automatically created with steps to complete participant offboarding tasks. Tasks are specific to each department.		3
	Track All Cohort Participation	Ability to track and review all cohort participation (past and present) within the incubator, innovator, and pilot programs.		1
	Advisor Assignments	Ability to link advisors / EIR to a company.		1
	Funding Source	Track company funding sources (Debt Fund, Impact Fund, VC, etc.).		3
Cohort / Program Management	Create Cohorts	Ability to create a cohort with information about the program type, start and end dates, and associated program information.		1
	Cohort Types	Ability to track cohort types (Incubator, FBA, etc.).		1
	Add Business to Cohort	Associate Accounts to cohort and primary company contact.		1
	View Cohort Member List	View list of cohort members.	Report - All Cohort Members Report - All APC Alumni	1
Opportunities	UI Pipeline	Review forecast / budget from Fund Development.		2
Impact Metrics	Create New Metrics	Ability to create new questions or metrics that need to be tracked. The metrics will have categories, question format, and question text.		3
	Group Metrics in Templates (or Job Forms)	Reuse metrics questions from across all grants or other departments and create a		3

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
		template specific to needs for grant or program.		
	Assign Templates to Grants	Ability to associate template with grant and view required questions for each grant.		3
	Assign Templates to Cohorts	Associate the template with cohorts to be used when sending surveys.		3
	Send Impact Metrics as Surveys	Use mass email tool to send cohort members surveys required for specific program.		3
	Collect Impact Metric Data	All data collected in survey should be associated with contact, account, cohort, and grant.		3
	Centralize Impact Metric per Cohort / Program	Ability to create reports and dashboard of aggregated impact data per cohort or program. The dashboard can be used as a quick reference when filling out grant reporting forms.		3

Market Transformation

The matrix below outlines how a CRM should be used by each team. Prioritization is on a scale of 1 through 5 where 1 is the highest priority and 5 is the lowest priority.

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Lead Management (Applications)	Pilot Applications / Recruitment	Ability for contact and application submissions to be automatically captured in CRM.		1
	Applicant Status	Track applications through statuses while going through the review / acceptance process.		1
	Activity Tracking	Ability to track calls, emails, and other activities related to prospective members.	Report - All Meeting Notes by Account	3
	Accepted Candidates	Accepted candidates will be converted into Accounts / Contacts to separate candidates from those accepted into programs.		1
	Invite Previous Applicants	Ability to mass email previous, unaccepted candidates to reapply to future programs.		4
Accounts and Contacts	Partner Accounts & Contacts	Track partner accounts and related contacts. Ability to track roles contacts play in Pilots or programs		1
	Partner Activity Tracking	Ability to track calls, emails, and other activities related to partners		1
	Program Pilots	Accepted candidates will be assigned to a pilot / alumni group.		1
	Pilot Onboarding Checklist	A task list is automatically created with steps to complete participant onboarding tasks (acceptance forms, APC training, setup in SafetySpot, etc.). Tasks are specific to each department.		3

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
	Pilot Offboarding Checklist	A task list is automatically created with steps to complete participant offboarding tasks. Tasks are specific to each department.		3
	Track All Pilot Participation	Ability to track and review all cohort participation (past and present) within the incubator, innovator, and pilot programs.		1
	Advisor Assignments	Ability to link advisors / EIR to a company		1
	Funding Source	Track company funding sources (Debt Fund, Impact Fund, VC, etc.).		3
Pilot / Program Management	Create Pilot	Ability to create a Pilot with information about the program type, start and end dates, and associated program information.		1
	Add Company to Pilot	Associate Accounts with pilot and primary company contact.		1
	View Pilot Member List	View list of pilot members.	Report - All Pilot Members	1
Opportunities	MT Revenue Pipeline	Review forecast / budget from Fund Development.		2
Impact Metrics	Create New Metrics	Ability to create new questions or metrics that need to be tracked. The metrics will have categories, question format, and question text.		3
	Group Metrics in Templates (or Job Forms)	Reuse metrics questions from across all grants or other departments and create a template specific to needs for grant or program.		3

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
	Assign Templates to Grants	Ability to associate template with grant and view required questions for each grant.		3
	Assign Templates to Cohorts	Associate the template with cohorts to be used when sending surveys.		3
	Send Impact Metrics as Surveys	Use mass email tool to send cohort members surveys required for specific program.		3
	Collect Impact Metric Data	All data collected in survey should be associated with contact, account, cohort, and grant.		3
	Centralize Impact Metric per Cohort / Program	Ability to create reports and dashboard of aggregated impact data per cohort or program. The dashboard can be used as a quick reference when filling out grant reporting forms.		3

Legal & Compliance

The matrix below outlines how a CRM should be used by each team. Prioritization is on a scale of 1 through 5 where 1 is the highest priority and 5 is the lowest priority.

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Accounts and Contacts	View Companies by Type	Ability to view company data by different relationships / types to LACI (partners, grantors, portfolio companies, etc.).	All Accounts by Type	1
	Track all Cohort Participation	Ability to track and review all cohort participation (past and present) within the incubator, innovator, and pilot programs.		1
Ironclad Integration	Company Onboarding	Ability for new companies to be added to Ironclad when they are at initial stages of signing contracts.		3
	Completed Contracts	Completed contracts are visible / synced to the CRM and kick off remaining onboarding action items.		3
Impact Metrics	Export Impact Metric Data	All data collected in survey should be associated with contact, account, cohort, and grant.		1
	Review Impact Metric per Cohort / Program	Ability to create reports and dashboard of aggregated impact data per cohort or program. The dashboard can be used as a quick reference when filling out grant reporting forms.		1
	Export Notes / Supporting Documentation	Ability to export reports of activity and engagement with advisors. The notes are printed and included in grant reporting requirements.		1

Facilities & Events

The matrix below outlines how a CRM should be used by each team. Prioritization is on a scale of 1 through 5 where 1 is the highest priority and 5 is the lowest priority.

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Accounts and Contacts	View Companies by Type	Ability to view company data by different relationships / types to LACI (partners, grantors, portfolio companies, etc.).	All Accounts by Type	1
	Track all Cohort Participation	Ability to track and review all cohort participation (past and present) within the incubator, innovator, and pilot programs.		1
	Onboarding Checklist (short-term)	Receive tasks related to the onboarding of new companies.		2
	Offboarding Checklist (short-term)	Receive tasks related to the offboarding of new companies.		2
Integrate with Campus Management Software (Future)	New Companies	CRM will push company / contact records to campus management software (Nexudus) at the time new organizations complete the sign-up / compliance process. This will start an onboarding workflow in Nexudus.		3
	New Leads	People that sign up for tours, non-LACI events, etc. will be sent from Nexudus to the CRM as a lead. The lead can be used by Fund Development & Marketing.		3

Finance

The matrix below outlines how a CRM should be used by each team. Prioritization is on a scale of 1 through 5 where 1 is the highest priority and 5 is the lowest priority.

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Customer Sync	Customer Sync	New customers or funders that are added to the CRM will be synced with QuickBooks.	QuickBooks Integration	1
Invoice Management	AR Invoices	Sales invoices can be created by any department for revenue-generating activities. All invoices will contain billing information, payment terms, payment type, amount, etc.	Print Sales Invoice	1
	AR Line Items	Sales line items will contain a map between the service provided and the GL account code in QB.		1
	Invoice Status	Sync the invoice status between QB and CRM.	AR Aging	2
	Recurring Invoices	Ability to create recurring invoices for a set amount of time.		2
	Invoice Aging	Notifications for invoices that are past due will be emailed to the billing contact on the account.	Invoice Due Email Notification Invoice Past Due Email Notification	2
Revenue Projections	Sales Forecast	View a forecast of upcoming revenue from the Fund Development efforts.	Opportunities Closing this Quarter	1
	Grant Pipeline	View a forecast of submitted grant applications that are pending award.	Grants Closing this Quarter	1
	Grant Distribution	Ability to see awarded grants that will be distributed over multiple years.	Closed Grant Revenue for current next year.	1

Marketing & Communications

The matrix below outlines how a CRM should be used by each team. Prioritization is on a scale of 1 through 5 where 1 is the highest priority and 5 is the lowest priority.

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Mailchimp Integration	Create Mailing List	Ability to create a mailing list and select contacts or leads to add to the lists. Mailing lists are created from data within CRM syncs to campaign members.		2
	Bounce Back	Email bounce backs are tracked on the contact record in CRM to prompt record owners to collect updated contact information.		2
	Activity Management	Each email sent to a contact is tracked in CRM. This will provide visibility into the frequency of email sent to individuals.		2
Eventbrite Integration	Sync Attendees	Ability to sync event attendee data to contact record in CRM.		4
	Sync Event Revenue	Sync event revenue with CRM Opportunity (Fund Tracking).		4

IT/Platform

The matrix below outlines how a CRM should be used by each team. Prioritization is on a scale of 1 through 5 where 1 is the highest priority and 5 is the lowest priority.

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Role-Based Permissions	Protect Sensitive Data	Some database records will contain sensitive financial data. The data should only be accessed by specific groups. Permissions need to restrict access on a field or record level basis.		1
	Permission Groups	Ability to easily apply permissions to groups of users.		1
	Layout Customizations	Users need to have tailored experiences when logging in and viewing records. This allows users to prioritize the fields / data that is relevant to them.		1
Data Management	Duplicate Management	The system should warn or prevent duplicate account (company) or contact (individual) data from being entered into the system.		1
	Reporting	The CRM will need to provide ad-hoc reporting tools to allow users to quickly create reports and export data.		1
	Data Visualization / Dashboard	The CRM will need to provide charts and metrics at a glance to users and LACI management.		2
Integration	API	The CRM will need to have an open API with the ability to integrate into other tools.		1
	Pre-Built Integrations	As LACI's needs or other tools change, a CRM that has out-of-the-box integrations available will provide more flexibility to their changing organization needs.		2

Feature Group / Epic	Feature / Process Name	Feature / Process Description	Output / Document	Priority
Cloud-Based	Cloud Platform	LACI's users and the outsourced IT infrastructure is best suited for a cloud-based application.		1
Maintenance	Automatic Maintenance	The CRM will be maintained with automatic maintenance as well as scheduled maintenance and enhancements.		1

Data Migration Strategy / Recommendations

QUALITY DATA IN

The strategic process to be followed in the data migration process includes the following steps:

- Take a back-up of all existing CRM data and store securely (ideally cloud-based).
- Assess the health of the existing CRM data and scrub or purge, as needed.
- Identify and quantify the various non-CRM data sources – i.e. establish the total population of data.
- Establish the value and relevance as well as assess the health of the data to ensure appropriate value of migrating the data.
- Document the data mapping requirements for each data type.
- Set up data conversion automation processes.
- Test the data migration into a staging/test instance of the system.
- Schedule the timing and proper cutoff of the conversion.
- Transform and import the data.
- Verify all counts, including data validation checks.

Overall, due to the flat-file state of the existing non-CRM data, LACI is already well-positioned for a fairly smooth transition. However, this is not to say that LACI is risk-averse.

The following areas will require particular attention:

- **Duplication Management** – Between the existing CRM data and the different spreadsheets being used across the organization for the same or similar information, there's bound to be duplicate data. The following methods should be taken to maintain a healthy data set:
    - Compare existing CRM data against spreadsheet data.
    - Normalize existing data for better exact and fuzzy matching.
    - Consolidate accounts and contacts using the holistically robust information that's currently segmented between departments.

- **Matching ID Data** – Not all of LACI's technology tools will be integrated with the CRM; however, they should be taken into consideration when devising naming conventions within the CRM. For example, it may be wise to adopt the Customer IDs used in QuickBooks for a streamlined reference methodology, regardless of whether the CRM and QuickBooks are integrated or not.

- **Historical Activity Data -** As the CRM begins to be used, there will be historical activity/impact data in a variety of sources. LACI will need to work to determine what historical data (based on need and level of effort) will need to be added to the system. Much of the historical data will need to be manipulated to map to new metric standardizations.

Reporting & Analytics Requirements

QUALITY INFORMATION OUT

Data reporting may be seen as a necessary evil – especially when the process for doing so is manual and, therefore, cumbersome and time-consuming. However, through interactive dashboards and on-demand reporting, CRMs synthesize and present data in an easily digestible format. This has transformed the way organizations report on metrics and KPIs, putting you in control of your data, not the other way around.

Reporting and analytics will be consolidated for global use across all departments as much as possible.

The current expected CRM outputs are outlined below:

APC Fellowship / California Workforce Development Board

- # of participants who have attained the NFPA 70-E certification
- # of participants who have attained the ESPA Electronics Systems Technician certification
- % of participants who are employed
- % of participants who are self-employed
- % of participants who are unemployed
- % of participants who are students
- Average % increase in hourly/salary wage
- Average # of participants who have transitioned from unemployment to any form of employment
- Average # of participants who have retained any form of employment
- Average # of participants who have transitioned from part-time employment to full-time employment
- Total # or % of female vs male participants
- Total # or % of disabled participants
- Total # or % of veteran participants
- % of participants by zip code
- % of participants by race/ethnicity

Community-Based Organizations / Community Engagement

- % of CBOs by community/neighborhood
- % of CBOs by population served

Energy Grant Program

- # of energy-related events either hosted by LACI or by sub-contractors

- Location
- # of attendees
- LACI-support startups involved

- # of referrals to CEC (California Energy Commission) and ecosystem partners
- Total # of pounds of GHG reduced/displaced
- $ savings
- Energy savings
- Impact to low income or disadvantaged communities

Innovators Program

- # of Innovators program applicants, including:
  - Type of clean energy technology
  - Stage of development of clean energy technology
  - Stage of commercialization
  - Referral source
- # of connections/introductions between startups in Innovators program to partners

Mobility Hub

- Total # of rides per month
- Monthly average # of rides per day
- Average # of rides per day
- Weekly ride count over time
- % of rides by asset (BMW X2City, Magnum Metro E-bike, Grüv)
- Average ride duration by asset (in minutes)
- # of 0.3 / 0.6 / 1.2 / 1.9 / 2.5 / 3.1-mile rides by asset
- Average # of rides per time of day
- % of unique users who took SafetySpot training who did not ride an e-mobility asset
- % of unique users that have used the e-mobility assets less than 3 times vs more than 3 times

Startups

- Total # or % of female leadership
- Total # or % of LGBTQ+ leadership
- Total # or % of people of color leadership
- Total # or % of veteran leadership
- Total $ of funding raised in cohort
- # of startups tapping into equity funding
- Total $ of equity funding
- # of startups tapping into debt funding
- Total $ of debt funding

- $ of Revenue to date
- Average % program satisfaction rating
- # of connections/introductions between startups in Incubation program to partners
- # of employees; # of contractors

TCC (Transformative Climate Communities) Watts Rising / Community Healing Tech Garden

- # of trees planted
- Square feet of other vegetation planted
- Square feet of other permeable surfaces added
- # of training activities related to tree/vegetation maintenance
- # of residents invited to trainings/activities related to tree/vegetation maintenance
- # of stakeholders trained on tree/vegetation maintenance
- # and type of clean technologies installed
- # of solar and energy systems installed
- Capacity of solar and energy systems installed (in kW)
- Energy savings from energy efficient technologies (in kWh)
- Water savings from water efficient technologies (in gallons)
- Square feet of garden planted
- Pounds of food distributed
- Square feet of greenhouse constructed
- # of tree planting workshops held
- # of tree planting workshops attendees
- # of Harvest Festivals held
- # of Harvest Festival attendees
- # of Community Gardening Days held
- # of Community Gardening Day attendees
- # of community tours given
- # of community tour attendees
- # of residents contacted through outreach (English vs Spanish)
- # of Master Gardening classes held
- # of Master Gardening class attendees
- # of composting classes held
- # of composting class attendees
- # of Culinary Arts classes held
- # of Culinary Arts class attendees
- # of Clean Tech for Gardening classes held
- # of Clean Tech for Gardening class attendees

Facilities and Events

- % of occupied vs unoccupied desk/office space
- Total $ in sub-user contracts

- Total # of campus members
- Total # of campus members by facility (all, Colyton Warehouse, APC, co-working/"hot desks")
- % of campus members by organization

Finance

- Weekly / Monthly # of offboarded campus members (with drill-down capability)
- Total $ of outstanding A/R
- Total $ raised to date (lifetime funding value) per company/organization

Fund Development

- Total # or % of funding per program/pillar
- Total # or % of funding per sub-program/initiative
- % of funding per source (Corporate, Foundation, Individual, Government, Organization)
- % of funding per company/organization
- % of funding opportunities by pipeline status
- Total estimated (forecasted) $ of funding
- Total expected $ of funding
- # of contract renewals per month / quarter
- Total $ raised to date (lifetime funding total) per program/pillar (MT, UI, EC)
- Total $ raised to date (lifetime funding value) per company/organization
- Total $ of funding invoiced vs received
- % of grants by submission status
- # of days since last contact with company/organization

IT

- % of active vs inactive CRM users
- # of CRM licenses vs total # of CRM users

Marketing & Communications

- % of organizations by program status (applied, active, complete, etc.)
- % of alumni that have active vs inactive event attendance
- % of accounts and/or contacts by zip code

Misc.

- Account and contact notes in a more exportable format for audits and grant reporting