Executive Summary
Information Management (IM) is requesting approval of the first amendment with Hitachi Solutions America, Ltd. (Hitachi) in the amount of $200,000 to provide Microsoft Dynamics Customer Relationship Management (CRM) System Technical Support for an additional two (2) year term ending on January 31, 2021.

Key Points
- The CRM system provides Port Staff with one place for up-to-date customer contact information including meetings, notes, Real Estate lease documents, Risk Management insurance information and Harbor Development Permits.
- Information Management requires system administration support for planned system upgrades and occasionally to support complex technical issues.
- POLB divisions have requested additional system functionality to further improve business processes which requires configuration and development support from CRM experts to complete.
- IM does not have CRM system architects or CRM software developers on staff.
- The current CRM contracts ends on January 30, 2019.

Recommendation
It is recommended the Board of Harbor Commissioners authorize the Executive Director to approve the first amendment to contract HD-8605 with Hitachi Solutions America, Ltd. for CRM System Support in the amount of $200,000, increasing the contract value not-to-exceed amount to $575,000. The contract end date will be extended two years to January 31, 2021.

Financial Impact
Based on current work and estimated future requirements, this amendment request adds $200,000 to increase the contract to a not-to-exceed amount of $575,000 and extends the contract date two years through January 31, 2021. Contract Compliance has reviewed this request and all questions have been answered to their satisfaction. Funding for this contract has been included in the approved FY 2019 budget and will be included in subsequent budget years.

Current CRM System work:
- Real Estate Document Management Enhancements
- Risk Management Insurance Visibility
- Contact Management Process Improvements

Planned CRM system work:
- Upgrade Microsoft Dynamics CRM 2016 to Microsoft Dynamics 365/CRM V9
- User enhancements and improvements to existing sub-systems
- Additional custom applications & reports
- Technical support and training as needed

Background
The Port of Long Beach’s Enterprise CRM system was first implemented in 2012 using Microsoft Dynamics CRM. The primary objective of the system was to create a single system to track and manage POLB customer information.

The key benefits are:
- One place for up-to-date customer contact information
- Port staff can access customer information anywhere via a mobile app
- Provides the ability to target communication by audiences
- Provides a technical platform to create custom applications / systems for POLB specific business needs

This system is primarily used by the Business Development, Real Estate, Risk Management, Environment Planning, Government Affairs and Construction Management Divisions. In addition to the core CRM functionality, several sub-systems were also developed including Lease Management, Risk Management Insurance Tracking and Harbor Development Permits.

Detailed Discussion of Current Issues
Microsoft Dynamics CRM software requires specialized technical expertise to create, maintain and enhance custom applications. Specialized technical expertise is also required for system upgrades and infrastructure support. Information Management staff currently provides business analysis and project management support for CRM work, but we do not have in-house resources that can perform upgrades, customizations or complex configurations. The planned work by Hitachi includes system upgrades, custom application development and configuration, reporting and training.