CRM REQUEST FOR PROPOSAL

PURPOSE

The purpose of this document is to define the requirements of the business for a CRM system, these requirements will form the request for proposal that will be sent to candidates to tender for the contract.
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Black Country Chamber of Commerce

Creative Industries Centre, University of Wolverhampton Science Park, Glaisher Drive, Wolverhampton, WV10 9TG
SUMMARY

The Black Country Chamber of Commerce (CHAMBER) will be accepting proposals to develop a new Customer Relationship Management System (CRM). The purpose of this Request for Proposal (RFP) is to ensure a fair evaluation for all candidates and to provide the candidates with the necessary evaluation criteria against which they will be judged.

The CHAMBER is currently using its CRM with the main activities based around reporting tools, membership management, marketing automation, workflow, event management and data management.

The CHAMBER also uses several other tools to drive traffic and increase member engagement, which include:

- Mailchimp (Email marketing tool)
- Survey Monkey (Research and survey tool)
- HootSuite (Social media tool)

The CHAMBER would like to "start over" with a new system that adopts the leading components from existing tools, while creating a user-friendly CRM for the entire team to utilise. This RFP is for the design, configuration, implementation and development of the CRM and for one year of technical and user training support. However it is the CHAMBER's intention to work with the chosen candidate as an ongoing partner for future work.

The successful candidate will have demonstrated proficiency, experience and creativity as a CRM provider; a clear plan and strategy for the implementation of the new CRM; interface design that makes it straightforward for non-technical CHAMBER employees to update the CRM; an understanding of cost-benefit analysis; and a working approach that is compatible with the CHAMBER's need for a long term relationship.
BACKGROUND AND ANALYSIS

The business plan for the next three years includes targets for direct sales and up-selling, using a CRM system to help employees to target members regarding relevant products and services to maximise the growth of sales and be able to monitor all leads and prospects ensuring they are processed effectively. Data on a member will need to be searchable in terms of criteria A or criteria B to allow analysis of the membership data and produce reports by criteria.

The new CRM system will be used to accurately report on the activity of sales and account management and produce reports on employee productivity, i.e. to know what is working well and what is not working well. The business has a need to be able to report on the activity of employees who are working in a sales and marketing capacity, this includes digital contact such as Twitter, Youtube and LinkedIn as well as traditional methods of phone, email and face to face. The Chamber relies heavily on email and social media for direct marketing and this new system would need to allow simple and effective use of target groups with information on members sectors with client segmentation, autoresponders and email series in place.

The new CRM system should include tools that support employees to move away from manual processes, including event management, marketing content, membership management and finance. It should help reduce the use of spreadsheets and manual entry documents and aid data control throughout the business. The CHAMBER will look to use the new CRM to help streamline all financial transactions for the business, including automated renewal, payments and Direct Debits ideally with integration with business accounts software – currently Sage Accounts, for many transactions we hope to allow members to self-serve.

The CHAMBER has a requirement to share data with local government initiative partners and a new system would need to demonstrate a simple and sensible approach to share sections of data from the new CRM system with another organisation in a “sandbox” environment that it is kept separate from the CHAMBER own data. With the approach of GDPR in May 2018 any proposals must allow us to share data with other organisations while meeting the required privacy and request for access regulations.

Most Chambers offer Export Documentation services and this Chamber is no different, this system is provided for businesses on behalf of the UK government, it is crucial that any CRM supports linking into the EZ-Certs export documentation system and can work bi-directionally with this system.
The business is moving away from ‘on premise’ IT hardware, email and Office Suite have already been migrated and it is accepted that any CRM system should follow suit and be a Cloud computing based solution.

The business website is to be replaced and brought into line with current digital presence trends, so a clear requirement if this new CRM will be full integration with the new website including the ability to use custom landing pages, email autoresponders, open/click measurements and automated surveys.

The RFP for this website will be released towards the end of 2017 ensuring that the successful applicant for this CRM system the opportunity to bid for the contract to deliver/ or work closely with the successful applicant for the website development.
PROJECT GOALS

The table below outlines the key outcomes that are required for the CRM project.

1. **MARKETING** - Grow membership, target specific demographics, drive digital traffic, develop relationships with non members and re-engage with existing members.
2. **SALES** - Increase member retention, increase upselling through better analysis of membership, report on sales team behaviours and operations to help support development/growth
3. **EVENT MANAGEMENT** - Reduce time to manage events, improve member experience end to end when attending an event. Automate the event attendance process
4. **MEMBERSHIP** - Improve member satisfaction through improved service and increased value.
5. **IT** - Ensure integration with existing systems, utilise a system that can scale up with growth, adhere to security and performance specifications.
6. **OPERATIONS** - Decrease costs through the automation of manual tasks, systemisation and streamlining of processes.
7. **EXPORT DOCUMENTATION** - Maintain a smooth transition from Corsair to the new CRM, this process is a government standard and therefore compliance and integration is vital.
8. **FINANCE** - Increase automation of credit control, simplify online payments, integrate with any Accounting package.
9. **BOARD LEVEL** - Grow the business net profit and increase this year on year. Report on actuals and trends in the membership
SCOPE OF WORK

The proposed budget should encompass all design, configuration, training, software licences, subcontractors, and any third-party vendor requirements for the support of the CRM for one year following the completion of the project. The date from which the support commences is to be agreed by the CHAMBER and the successful candidate during the contract negotiation stage.

The services that are in scope for the CRM system from a supplier are listed below.

1. Project Management - Collaboration and time tracking tools, project meeting control, update communication to stakeholders, risk/issue management.
2. Software Installation - Installation of software to client devices such as Outlook connectors for email.
3. Backup and Restore - Ability to download data as required, restore to an agreed rollback retention period.
4. Data Migration - Ownership of the data migration process, collaboration with internal data owner to adhere to Data Protection and IT Security policies. All data is to be stored in UK data centres.
5. User Interface/Experience - Focus on ease of navigation, ability to search all CRM, dashboard for analytic reports.
6. Configuration - System settings such as date, currency, etc, email integration, multiple levels of security permissions, client settings, mobile device, client views.
7. Customisation - Creation of new fields, attributes, labels and types, creation of new forms and dashboards, creation of business workflows, creation of marketing automation. All customisation is to be limited to the supplier only. No user customisation is required.
8. Development - Integration with accounting systems, integration with the EZ-Certs export documentation system, enhancements to existing functionality.
9. Reporting - Creation of reports to show metrics and KPIs
10. User Acceptance Team Training - Training of the UAT team in advance of the testing phase.
11. User Acceptance Testing (UAT) - Operated in implementation cycle to allow for change and workarounds.
13. Go Live Rollout - Sign off of commercials, licensing, final data migration.
14. Go Live Support - Support to minimise disruption during the rollout, go live plan for reference, access to training materials.
15. Ongoing Support - Agreement of ongoing support and development for one year

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16. Core updates to the system to be included in the support package, including all security updates.

OUT OF SCOPE

The services that are out of the scope for the candidate are listed below.

1. Data Cleansing - All data will be cleaned internally prior to migration.
2. Ongoing Administration - The day to day administration of the CRM will be managed internally.
TECHNICAL REQUIREMENTS

The proposal must include reference to the following technical requirements.

1. Client Devices - Support is required for Windows 8.0, 8.1 and 10 operating systems.
3. Email Integration - Support is required for Microsoft Exchange Online and Microsoft Outlook 2013/2016 editions.
5. Email Marketing - Support is required for integration with tools like Mailchimp or for inbuilt marketing automation.
6. Accounting Package - Support is required for integration with Sage Accounts.
7. Website - The ability to accept inbound marketing leads from the CHAMBER website.
8. Social Media - Integrations to manage Twitter, LinkedIn and Facebook is preferred.
9. International Trade - Support is required for the E-Z Certs API/URI¹
10. Audit Trail - Support is required for auditing all logins, actions, amendments for all users including the membership.
11. Ongoing Support - Support is required for the hours Mon-Fri 9am to 5:30pm.
12. Helpdesk - Explanation of how support is provided to end users, the SLA for fulfilment requests and what the after hours policy is are all required.
14. Performance - Describe the ease of use features and stand out features of the user interface and experience.
17. Security - 128-bit SSL and 2048-bit RSA key certificates are required.
18. Security - All data that is exported for testing must be anonymised.
19. Availability - Explanation of the hosting platform, is this shared or individual per client? Is this in house or a 3rd party provider? What load balancing and redundancy is in place?
20. Availability - The uptime guarantee and SLA must be stated.
21. Testing - Describe the testing process and criteria including UAT.
22. Training - Describe the training process and post deployment resources available.
23. Timeline - Outline the milestones for deliverables, expected Go Live date.
24. Performance - What guarantees are in place that performance will not degrade over time or under times of heavy use?

BUDGET

The project has an agreed budget by the Board of Directors as follows.

<table>
<thead>
<tr>
<th>AREA</th>
<th>BUDGET MAXIMUM</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM design, implementation, configuration and testing</td>
<td>£50,000</td>
</tr>
<tr>
<td>Ongoing Support Per Annum</td>
<td>£10,000</td>
</tr>
</tbody>
</table>
PROJECT TIMELINE

The timeline for the tender process is as follows.

Submissions are to be made in electronic format only, this should consist of one PDF file which can be authored in the candidate's preferred application. Within the PDF each of the five methodology statements should be included.

Proposals received after October 31st 2017 will not be considered.

Proposals should be emailed to tenders@blackcountrychamber.co.uk

<table>
<thead>
<tr>
<th>Event</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP</td>
<td>Released October 4th 2017</td>
</tr>
<tr>
<td>Questions to Buyer</td>
<td>Open from October 4th 2017</td>
</tr>
<tr>
<td>Submission of RFP</td>
<td>Close date October 31st 2017 at 5pm</td>
</tr>
<tr>
<td>Presentation/Interviews</td>
<td>November 6th, 7th, 13th &amp; 14th</td>
</tr>
<tr>
<td>Decision</td>
<td>21st November 2017</td>
</tr>
<tr>
<td>Contract Award</td>
<td>December 4th 2017</td>
</tr>
<tr>
<td>Start</td>
<td>January 2018</td>
</tr>
</tbody>
</table>
**PRINCIPAL POINT OF CONTACT**

The PPC for the project until Contract Award is an external consultant, the secondary point of contact is an internal Manager.

The invitation to respond and any questions regarding the proposal are to be sent to Kyle Heath.

<table>
<thead>
<tr>
<th>PPC</th>
<th>Contact Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kyle Heath</td>
<td><a href="mailto:tenders@blackcountrychamber.co.uk">tenders@blackcountrychamber.co.uk</a> Mobile 07747012730.</td>
</tr>
<tr>
<td>Lindsay Slater</td>
<td><a href="mailto:lindsayslater@blackcountrychamber.co.uk">lindsayslater@blackcountrychamber.co.uk</a></td>
</tr>
</tbody>
</table>
EVALUATION CRITERIA

The process will be open and competitive.

The proposal must include a cover page that includes:
- Company name
- Address
- Primary contact with email
- Direct telephone line and mobile.

References for three current clients are required. Company name and contact details are to be included.

The candidate’s terms and conditions of sale must be included with the proposal.

The CHAMBER will make a decision based on two specific criteria shown below:
1. Budget 30%
2. Quality/Technical 70%

Each of the criteria defined will be then evaluated by importance and split into sub criteria, the weighting for each of these is listed below

<table>
<thead>
<tr>
<th>Budget Criteria</th>
<th>Description</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td>The candidate has understood the constraints and has proposed a realistic budget for all components.</td>
<td>30%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quality/Technical Criteria</th>
<th>Description</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXPERIENCE AND EXPERTISE</td>
<td>The candidate will show they have successfully completed similar projects and have the qualifications, personnel and availability to complete this project.</td>
<td>30%</td>
</tr>
</tbody>
</table>
The candidate can show that their development platform is based on recognised standards; that security and privacy principals have been implemented.

The candidate has proposed a reasonable timescale that addresses the design, implementation and testing stages.

The candidate has shown the right combination of personal service, enthusiasm and passion throughout the proposal, presentation and interview stages. The successful candidate will 'fit' with the CHAMBER.

The candidate can provide telephone and online customer support for the business hours 09:00-17:30 Mon-Fri. Commitment to continuous improvement of product.

The criteria will be marked by the decision board based upon an evaluation of the above criteria.

The evaluation panel will consist of two members of the CHAMBER management team, a Director of the Board and an external CRM consultant. This decision board will evaluate each bidder’s response and award the contract to the supplier that offers the most economically and operationally advantageous proposal based upon the Chamber's overriding requirements.

Should the CHAMBER decide to conduct the interview process with a candidate we will write to you again to confirm the date, time, venue, duration of interview, the personnel required to attend etc.

This will give the scoring panel the opportunity to revisit the responses and the interview may result in the initial scoring being altered up or down as appropriate.

**HOW YOUR PROPOSAL WILL BE EVALUATED**

Each of your responses to the following Method Statements will be evaluated using scores that reflect the extent to which the responses have addressed the published criteria.

These scores will then have the published weightings applied to them and will be added together to give an overall Score. Candidates must respond to the Method Statements in full and avoid making unsubstantiated reference to company policies, statements or other documents.
**Pricing Criteria**
The CHAMBER requires a fully inclusive price for the tender and the expectation for each criteria is outlined below.

All pricing in the proposal must be inclusive, if there are exclusions for specific costs such as third-party licensing of software, you must provide a detailed list and explanation of these costs. All costs for additional development or consulting that is outside of the scope of this RFP must be stated in terms of hourly rate, flat fee or retainer.

**Sub-Contractors**
If the work requires the use of subcontractors, this must be stated clearly in the proposal. The CHAMBER will not refuse a proposal on the basis of using subcontractors however the subcontractors must be identified and the work they perform clearly defined. Any subcontractor must be a limited company or partnership with public liability, employers liability and indemnity insurance.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Expectation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licencing</td>
<td>Cost per licence, breakdown of cost over three years, multiple user discounts, licensing model (named user or concurrent)</td>
</tr>
<tr>
<td>Project management, installation, configuration, deployment and training</td>
<td>Fixed price costs assuming provision of standard solution meeting specification. Additional work as requested by CHAMBER to be at standard rates</td>
</tr>
<tr>
<td>Support and maintenance</td>
<td>Annual maintenance cost, breakdown of different support options</td>
</tr>
<tr>
<td>Updates and Upgrades</td>
<td>All product updates and upgrades to be inclusive of cost</td>
</tr>
<tr>
<td>Training Services</td>
<td>Schedule of User acceptance training, training the trainers and all power user training required to administer the system</td>
</tr>
</tbody>
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*The rates and prices inserted by the candidate will be inclusive of all disbursements and exclusive of VAT.*

**Method Statements**

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To help judge your capability to meet our requirements you must provide a number of Method Statements. Each response to these statements should be no more than the indicated word count. Responses must set out in a clear and concise manner, how you will deliver the requirements in the Specification.

Your responses must clearly identify the Method Statement number to which it relates

SCORING CRITERIA
Method Statements are required for the following. Each statement will be scored to establish the quality score (0 to 5), which will be weighted to reflect level of importance.

<table>
<thead>
<tr>
<th>Score</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>No response provided/does not address any of the issues</td>
</tr>
<tr>
<td>1</td>
<td>Very poor response with minimal issues addressed</td>
</tr>
<tr>
<td>2</td>
<td>Poor response with few issues addressed</td>
</tr>
<tr>
<td>3</td>
<td>Satisfactory response with the majority of issues addressed</td>
</tr>
<tr>
<td>4</td>
<td>Good response with all the issues satisfactorily addressed</td>
</tr>
<tr>
<td>5</td>
<td>Outstanding innovative response</td>
</tr>
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</table>

Your responses to these method statements will be incorporated into the agreement should your submission be successful.
METHOD STATEMENTS

METHOD STATEMENT 1 EXPERIENCE AND EXPERTISE

A statement of approach and experience is required, this should contain an overview of the candidates experience in implementing CRM systems for clients. Relevant work is to be provided, examples of successful implementations should be submitted.

You should include three examples of similar work undertaken with the following detail
● Name of organisation
● Value
● Brief description of the service
● Start and end dates

Assessment Criteria
● Understanding the CHAMBER requirement
● Demonstration of experience of providing similar services

Maximum words - 1000
Weighting 30%

Response: Please expand the box as required:

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**METHOD STATEMENT 2 TECHNOLOGY**

A statement of the technology underlying the product, the type of security used to access data (2 Factor Authentication, SSL). Explain how the product is scalable for performance to ensure that as the organisation grows the system can grow with it.

The following specific requirements must be met and agreed that they can be provided:

- Ability to run reports based on company and contact criteria
- Ability export report data to spreadsheet for use in email marketing
- Integration with CHAMBER website to include bi-directional flow of data
- Ability to track and report on team member activities including emails, phone calls, meetings and notes
- Ability to link payments to accounts package
- Ability to link Export Documentations EZ Certs system

Specific reference should be made to the GDPR EU legislation that will become UK law in May 2018, how the system addresses the challenges of this legislation and supporting evidence that the system adheres to privacy by design.

Further statement should be provided that explains how the CRM will integrate with the current accounts package of Sage Accounts and the EZ Certs package for the Export Documentation department.

**Assessment Criteria**

- Performance is scalable to growth
- Product is fit for purpose
- Data protection legislation requirements
- Integration to external applications

**Maximum words - 1000**

**Weighting 20%**

Response: Please expand the box as required:
### METHOD STATEMENT 3 TIMELINE AND DELIVERY

A statement of how the candidate will meet the timeline as set out by the CHAMBER, including start and end dates for:

- Scoping and design
- Build and deployment
- User Acceptance Training
- Sign off
- Go Live

A statement of how the project will be delivered including:

- Identification of key personnel involved in the delivery including competencies and experience
- Example of escalation process
- Testing process and confirmation of how go live date can be achieved

### Assessment Criteria

- Experience of delivery personnel
- Ability to deliver project within timescales

**Maximum words - 500**

**Weighting - 30%**

Response:
METHOD STATEMENT 4 BUSINESS FIT

For qualification purposes the proposal should include a brief company profile, the length of time in business, the Board of Directors, the hosting capacity of the service, vendor or licenced arrangements, the last set of audited accounts, public liability, employers liability and professional indemnity insurance with a minimum of £500,000 and any other appropriate attributes.

A brief overview of what makes you different from other candidates and why the CHAMBER should choose your proposal should be included

Assessment Criteria

- Market experience and history of candidate
- Candidate is fit for purpose

Maximum words - 500
Weighting 20%

Response:
**METHOD STATEMENT 5 MAINTENANCE AND SUPPORT**

Detail arrangements for customer service contact methods, Helpdesk service level agreements and routine maintenance windows. Optional support options for out of business hours and weekends.

Specify expected roadmap for product updates and upgrades over following 12-18 months.

**Assessment Criteria**

- Ability to provide support within business hours
- Ability to show continuous improvement and future features

**Maximum Words - 250**

**Weighting 10%**

Response:
CONTRACT TERMS

The CHAMBER will enter into a contract negotiation and final pricing on selection of the preferred candidate. All contracts are subject to review by the CHAMBER legal counsel and the Board of Directors. The project will be awarded on signing of a contract or agreement, which outlines the terms, scope, budget deliverables, timeline and other necessary items.
ORGANISATION BACKGROUND

The business is a Chamber of Commerce and is a not for profit organisation. The business does not have charitable or HMRC exempt status, it is an organisation that operates to provide the best value and service for its membership. The core function of the business is to provide support and guidance in the area of business growth and operation. The business targets the Black Country region of Wolverhampton, Walsall, Sandwell and Dudley specifically, the current membership is approximate 1250 members.

The business strategic vision statement is shown below.

To provide first-class business support to companies across the Black Country, to lobby on their behalf and to create a sense of belonging to the wider chamber movement.

The values of the business are shown below.

- To always support belonging and gathering: We will bring businesses together to help them grow through new commercial opportunities and to create a common voice on local issues.

- To communicate clearly and effectively to our members, partners and each other: To help us adapt and grow in a fast changing social environment we will embrace new ways of communication to allow effective feedback from businesses and to help us customise new support products.

- To be creative, risk takers and brilliant problem solvers: We will embrace a ‘can-do’ attitude and lead local partnerships with a positive approach to working together.

- To be leaders in diversity: We will proactively aim to work with members that reflect the ethnic and cultural communities that drive the local economy and develop programmes to engage with young entrepreneurs and enterprises.

- To put our people first: Our staff are our greatest asset and wherever possible we will help them develop and drive the business forward. When we recruit, we will aim to employ the best candidates through first class recruitment processes.

- To take pride in achievements: Of our local businesses and members, of our local partners and of our team members.

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