**REQUIREMENTS**

The client will require the selected bidder to provide a CRM software solution, system planning, project management and implementation services relative to the deployment of the CRM software solution.

The successful bidder is expected to result in a fixed price contract for the purchase, installation and configuration of the CRM software solution. This must include product support and maintenance for a period of one year.

The client has identified the following Bidder requirement deliverables:

* Proposed hardware,
* Proposed Software,
* Licensing for 25 concurrent users and
* Architecture to support the proposed CRM software solution.

Proposals must include the following deployment options and include cost;

* Software as a service (SaaS)
* On premises hosting
* A detailed, phased implementation and deployment plan to configure and install the CRM software solution application;
* Proposed business process workflow designs;
* Gap analysis to identify custom vs. configurable desired functionality;
* Detailed design of software configuration;
* A strategy to provide a complete range of system testing;
* System and user acceptance testing;
* User and administrator training costs;

A complete set of documentation including:

* Project management materials
* Status reports
* Issues log
* Risk mitigation assessment
* Software licensing plan, including costs and licensing options for on premise and SaaS for 25 concurrent users;
* The ability to access information from a mobile device is crucial. The ability to view historical data of a particular customer and update information after a meeting on a mobile device;

Describe the systems and technology that are used in your organisation which are used to support clients with CRM applications as implemented by your company; and

A detailed client-specific programme showing activities and timeframe for execution of the scope.

1. **Information Technology Overview**

The following provides a high-level overview of the client Information Technology environment

Cisco Network infrastructure

1. **Desktops/Laptops**

* HP Hardware
* Microsoft Windows 7 Professional X64
* Microsoft Office 2013
* Microsoft Internet Explorer 10
* Eset Nod 32 Antivirus

1. **Servers**

**HP Hardware**

* Windows Server 2008 & Windows Server 2012

**Virtualization**

* Microsoft Hyper V

**Directory Services**

* Active Directory

**Databases**

* Microsoft SQL Server 2008
* Microsoft SQL Server 2012

**Mail**

* Microsoft Exchange 2010
* Microsoft SharePoint 2010

**Remote Access**

* Cisco VPN

**Mobile Devices**

* Apple iPad

**B. Functional Requirements**

1. Capturing of stakeholder information
2. Capturing of feedback from distribution channel meetings
3. Capturing of special requests from the distribution channel
4. Uploading distribution channel reports
5. Distribution channel analysis
6. Monitoring distribution channel financial performance
7. Managing distribution channel
8. Managing activities per distribution channel
9. Managing distribution channel contacts
10. Loading NMI certificates
11. Diary management
12. Knowledge sharing with relevant users
13. Stakeholder prioritisation
14. Stakeholder categorisation
15. Categorisation of accounts
16. Prioritisation of accounts
17. Mobile access
18. Maintaining a history of open and closed issues
19. Managing escalations
20. Dashboard reviews
21. Integration of the CRM tool into Client systems
22. Generation of reports
23. Complaints management
24. Complaints monitoring
25. Searching of records
26. The ability to email in MS Word, PDF and other formats
27. Audit trail

**C. Administration Functions**

1. The ability to create, modify or delete user access;
2. Define access rights by role or group;
3. Generate reports identifying users of the system and access level;
4. Add or define a new value to an existing field;
5. Add or delete a field;
6. Track or audit user activity; and
7. Design custom reports for management to report on statistics and data.

**D. Project Scope Overview**

**The following is a brief summary of the project:**

1. Acquire, install and configure the proposed CRM software solution;
2. Provide project management and oversight of the implementation;
3. Provide user and administrator training; and
4. Provide software maintenance and support as per the Service Level Agreement requirements.

**E. Service Level Agreement**

Maintenance and support must be provided through an annual service level agreement (SLA). The successful bidder must include a service level agreement in the proposal and provide guaranteed pricing for a year. The SLA will not commence until the application is in production.

The maintenance agreement must provide ongoing system support and maintenance, including upgrades, bug fixes and patches, and other technical support necessary.

The bidder’s service level agreement (SLA) must include the following:

1. Procedures to resolve critical system problems;
2. Emergency and 24x7 support options;
3. Tiered support options to handle escalations; and
4. Estimated time to respond based on severity of calls logged.