Request for Proposal

Date: 30 October 2024

Selection of Agency for Implementation of a Zoho Customer Relationship Management (CRM) System

1. Background and Context

The Coalition for Disaster Resilient Infrastructure (CDRI) is a multi-stakeholder global partnership of national governments, UN agencies and programmes, multilateral development banks and financing mechanisms, the private sector, and academic and knowledge institutions. It aims to address the challenges of building resilience into infrastructure systems and development associated with it. The vision, mission, goal, and objectives of the CDRI are explicitly linked to the post-2015 development agendas. The Coalition will also contribute to the resilience of the global infrastructure systems in an increasingly interconnected world. The outcome of such collaboration would be aimed at building resilient economies and resilient people through cross-sector commitments at all levels towards adaptation and resilience with concrete outcomes that will bring resilience action to a global scale.
CDRI Website: www.cdri.world

2. Challenges

The CDRI's engagement with both Members and stakeholders is steadily increasing and is expected to accelerate in the near future. As this engagement grows, it is essential for CDRI to implement a system to track and monitor all interactions regularly for efficient and effective stakeholder engagement. The absence of such a system is currently posing several challenges, including:

- A lack of consolidated information on the engagement of Members and other stakeholders, making it difficult to map ongoing and upcoming interactions.
- Difficulty in systematically categorizing current engagement levels with members and stakeholders.
- Increased efforts and resources required to coordinate, track, and report all engagements.
- Reduced visibility of all engagements and CDRI's efforts when reporting to its governance bodies.

3. Proposed solutions:

To effectively track, monitor, analyze, and manage all its engagements, CDRI needs to implement a Zoho Customer Relationship Management (CRM) system, referred to as the "**CRM System**" in the entire document, customized to its requirements.

4. Scope of Work

4.1 Objective

The broad objective of the CRM system is to have an institutional repository that is dynamic and provides a hierarchical and structured engagement amongst all its stakeholders. The proposed solution should enable the listing of current opportunities in a structured manner, issues and bottlenecks of current projects, and provide various customized reports. By adopting a comprehensive CRM system, CDRI will be better positioned to manage its diverse partnerships, coordinate its global initiatives, and demonstrate the value it provides to its members and the broader disaster resilience community. An effective CRM system will help CDRI in the following ways:

- **Tracking and Monitoring Engagements:** A CRM system will enable CDRI to effectively track and monitor its engagements with member countries, non-member countries, UN agencies, development banks, international organizations, private sector organizations, multilateral forums, platforms, and other stakeholders. This will provide visibility into the status of member engagements, partnerships, collaborations, and initiatives across CDRI's diverse stakeholders.
- **Improving Responsiveness:** A CRM system will allow CDRI to be more responsive to the needs and requirements of its members by tracking inquiries, requests for assistance, and meeting outcomes, ensuring timely and appropriate follow-up.
- **Maintaining Institutional Memory:** As CDRI grows its membership and activities, a CRM system will help maintain an institutional memory of its engagements, decisions, and outcomes, which is particularly useful for onboarding new members and ensuring continuity.
- **Coordinating Activities:** With increasing engagements and conversations with diverse stakeholders, members, and non-members, spanning national governments and international organizations, a CRM system will help CDRI coordinate activities, share information, and ensure alignment across its various teams, functions, and projects.
- **Enhancing Collaboration:** By centrally managing stakeholder data and interactions, a CRM system will facilitate greater collaboration among CDRI members, enabling the coalition to identify synergies, facilitate knowledge-sharing, and coordinate joint initiatives more effectively.
- **Targeted Outreach:** With a CRM system, CDRI can segment its stakeholders and tailor its outreach, communications, and support to the specific needs and interests of different member groups or regions.

4.2 Functional Requirements (Partnerships)

- **Partner Onboarding and Engagement journey** – Track the member onboarding and approval processes through the CRM system.
- **CDRI Secretariat Governance Committees (Workflows/ Approvals) -** The CRM system should offer the provision for creating and modifying the workflows/processes as per CDRI requirements.
- **Segmentation and Tagging**: Categorize stakeholders based on attributes like member/non-members/region, groups, level of engagement, and interest areas.
- **Comprehensive Contact Profiles:** Maintain detailed profiles with contact information, Subject matter experts, engagement history, and relevant notes.
- **Support chronological** tracking of engagement and the ability to upload all communications and retrieve them in a report form as required.
- **Interaction Tracking**: Record and track all interactions/touchpoints by different teams in the organization with partners, help generate status reports/ visibility on the dashboard.
- **Engagement Tracking**: Help track all planned and ongoing engagements at distinct stages like - discussions, experts' engagements, conference/workshop participation, advocacy collaborations, projects, and services with all stakeholders and help generate reports.

- **Task Management and Tracking**: Assign and schedule tasks to team members and track progress to ensure follow-up and coordination on stakeholder activities. Review the progress of engagement of each stakeholder.
- **Engagement Analytics:** Generate reports and dashboards to analyze engagement levels, show trends, and measure the effectiveness of outreach efforts.

4.3 Features required in a CRM systems

To achieve the above, the CRM system should have the following features:

- **Customizable Fields and Workflows:** Customize fields and workflows to match the specific needs and processes of CDRI.
- **Segmentation and Tagging:** Categorize stakeholders based on attributes like sector, region, level of engagement, and interest areas.
- **Comprehensive Contact Profiles:** Maintain detailed profiles with contact information, engagement history, subject matter expertise and relevant notes
- **Engagement Tracking:** Help track all planned and ongoing engagements at different stages like - discussions, experts' engagements, event participation, advocacy collaborations, projects, and services with all stakeholders and help generate reports.
- **Task Management and Tracking:** Assign tasks to team members and track progress to ensure follow-up and coordination on stakeholder activities.
- **Engagement Reports:** Generate reports and dashboards to analyze engagement levels, identify trends, and measure the effectiveness of outreach efforts.
- **Relevant Documents, Approvals & Minutes of Meeting:** The system should have a provision for uploading the relevant documents, minutes of the Meeting (MOM), and approval copies for engagement with stakeholders.
- **Access Control:** Manage user permissions to control access to sensitive information and ensure that only authorized personnel can view or edit data.
- **Third-party Integrations:** Integrate with other tools and platforms such as email marketing software, Outlook, Office 365, social media, ERP, and project management tools, etc.
- **Data Security and Privacy:** Ensure robust security measures and compliance with data protection regulations to safeguard stakeholder information.
- **Mobile App:** The CRM system should also be accessible on Android/iOS-based mobile devices through a Mobile Application.

4.4   Additional Requirement

In addition to the above, the following are the essential requirements for the proposed CRM system:

- CRM system should accompany a comprehensive content management system which should allow the administrator to create user roles and enable access rights ranging from the entire solution to a specific module.
- CRM system should be vertically and horizontally scalable to handle increased load without requiring redesign.
- The CRM system should be compatible with various browsers (i.e. IE, Mozilla Firefox, Chrome, Opera, etc.).
- CRM system should be compatible and responsive in terms of the ability to function reasonably efficiently in poor connectivity contexts and be compatible and responsive to industry-standard browsing environments and mobile devices (Android/iOS/Windows).

- CRM system should provide alert notifications via email, SMS, or other mode of communication.
- CRM software solution must be able to integrate with third-party software.
- CRM system should incorporate necessary security features against hacking and defacement.
- CRM system should have a workflow-based process approval and archival mechanism.
- CRM system should have the capability for continuous improvement and gradation.
- CRM system should have adequate security provisions for preventing tampering with the software and data Archival of information and data.
- CRM system should have the functionality of user audit logs.
- CRM system should have a provision for report generation as per requirements.
- The selected service provider should be tested thoroughly and provide a demo and end-user training before the Go-Live of the software solution.
- User manuals, Developer manuals, and Training of all users.
- The agency should provide hyper care of minimum 1 month from the Go-Live date.
- CRM system should be secure web-based access using HTTPS.
- Data Confidentiality and Security:
    - The service provider will implement appropriate security measures to protect the CDRI data from unauthorized access, loss, or alteration. This includes but is not limited to encryption, access controls, firewalls, intrusion detection systems, and regular security audits.
    - The service provider will comply with all applicable data protection laws and regulations as required by the nature of CDRI's data.
    - The service provider will maintain strict confidentiality regarding any information accessed during the provision of services. It will not disclose or use the data for any purpose other than providing the agreed-upon services.
- Data Breach Response:
    - In the event of a data breach, the service provider will promptly notify the CDRI and provide necessary cooperation in investigating the breach.
    - The service provider will implement appropriate remedial actions to mitigate the impact of the data breach and prevent future occurrences.
- Data Ownership:
    - CDRI retains ownership of all data stored or processed on the cloud server infrastructure provided by the service provider.
    - The service provider acknowledges that it has no ownership rights or claims over the CDRI's data.
- Liability and Indemnification:
    - The service provider shall be liable for any data confidentiality and security breaches caused by its negligence or intentional misconduct.
    - The service provider shall indemnify and hold CDRI harmless from any financial or reputational damages arising from data breaches or unauthorized disclosure caused by the service provider's actions or omissions.
- The hosting server, cloud space, and all cloud-related services and tools shall be procured and managed by the service provider.
- Data server locations: CDRI is an international organization with its head office in New Delhi, India.
- Data Backup and Suitable Disaster Recovery mechanisms should be taken care of post-deployment of CRM system.
- The service provider will provide technical support in case of any functional or technical issues.

- Successful implementation in terms of completeness and timely accomplishment of the outcome.
- Uptime: The uptime percentage of the system should be greater than 99.5%.
- Number of Users: The initial number of users is 15.

5. Period of engagement
The duration of the assignment will be **36 months**

6. Qualification criteria
Evaluation Criteria for Qualification for Implementing Agency:

Minimum Eligibility Criteria:

I.   The agency must be a Zoho Premium Partner

II. Financial Eligibility:
     The Agency should have a minimum average turnover of USD 50000 (or equivalent) for the last 3 financial years.

III. Technical Eligibility:
     The Agency must have experience of at least 5 years in undertaking a project of a similar nature (share working models of similar work).

7. Submission of proposals

Agencies should submit a technical proposal and financial proposal for the detailed **Scope of Work (SoW) as mentioned above**. Proposals should be prepared with scanned copies of all necessary documents and converted into separate PDF files – each having different passwords. The file must be named as.

· **[Consultant name] Technical Proposal (Open PDF file)**
· **[Agency] Financial Proposal (Name of Assignment) (PASSWORD protected file)**

- *Clarifications by Bidders:* Bidders requiring any clarification on the RFP document may contact the Procurement Division of the CDRI in writing by email: **tender.projects@cdri.world**

- *Technical Proposal:* A project proposal document covering the Agency's interpretation of the overall SoW. The document should contain the overall approach toward the delivery of the project too.

- *Financial Proposal:* Agencies shall quote an all-inclusive lumpsum price covering all aspects mentioned in the scope of work, for the suggested time, as per the format given in **Annexure-I**. All payments shall be subject to tax deduction at the source per India's tax laws.

- THE PROPOSAL IS TO BE SUBMITTED through EMAIL to **tender.projects@cdri.world** on or before **20 November 2024 by 11:59 PM IST** with the subject line: **"PROPOSAL SUBMISSION**

FOR **"Selection of Agency for Implementation of a Zoho Customer Relationship Management (CRM) System"**. Proposals received later than this deadline are liable for rejection.

- The email should include the password-protected-PDF file listed above as an attachment. Each Agency should send only one email for the specified service. Multiple emails may lead to the disqualification of the bidder.

- **Note: The Financial Proposal PDF should be password-protected. The password for FINANCIAL PROPOSAL MUST NOT BE SHARED ALONG WITH THE PROPOSAL. The password for the financial proposal will be requested separately.**

- Use Times Roman font to send passwords and ensure readability.

- The password of the Financial proposal will be asked after the evaluation of the Technical proposal.

- **Validity of Proposal:** The proposal must remain valid and open for acceptance for a period of 90 days from the date of opening of the proposal.

8. Evaluation

i. The agency will be selected following a **Quality Cum Cost Basis (QCBS)** of selection.

ii. Proposals shall be evaluated as follows: **Evaluation Criteria for Technical Bids 100 points**:

S N	Technical Evaluation Criteria	Maximum Marks
1.	Number of completed/ ongoing (>50% completed*) Projects of similar nature (software provider/ implementation in reputed Organizations) **(5 Marks for each project)**	30
2.	Qualifications and relevant experience of Key Staff • Project Manager along with a resume **(10 marks)** • Team Leader (CV) along with a resume **(10 marks)**	20
3.	Relevant Employee Strength: **(15 Marks)** • Greater than or equal to 20 **(15 Marks)** • Greater than or equal to 15 and less than 20 **(10 Marks)** • Greater than or equal to 10 and less than 15 **(5 Marks)** • Less than 5 **(0 Marks)**	15
4.	**Methodology:** Acceptability and detailing of methodology and work plan (Proposed Project Plan, Business Design, Implementation Approach and Methodology, Identified Project Risks & Mitigation Strategies, Detailed timelines of project execution, Training Plan for various stakeholders and users of CRM systems, Change Management, Process for creation of	35

Documentation/Help Manuals and their updation from time-to-time, Proposed Escalation Matrix to address tickets raised)	
Maximum Marks	**100**

Rating Multiplier for points 2 and 4 above in the Technical Evaluation Criteria	
Level of Responsiveness	**Rating**
Irrelevant	0%
Poor	25%
Satisfactory	50%
Good	75%
Excellent	100%

iii.   The applicant scoring more than 70% in the technical evaluation shall be considered for financial evaluation. 75% weightage will be awarded for the Technical Proposal and 25% weightage will be awarded for the Financial Proposal. Technical Bid will be assigned a Technical score (Ts) out of a maximum of 100 points.

iv.   The Agency's Financial Scores (Fn) are normalized as per the formula below:

F_n = F_{min}/F_b * 100 (rounded off to 4 decimal places) Where,
F_n = Normalized commercial score for the Agency under consideration
F_b = Absolute financial quote for the Agency under consideration
F_{min} = Minimum absolute financial quote

Formula for final evaluation:
Composite Score (S) = T_s * 0.75 + F_n * 0.25

v.   The agency with the highest Composite Score (S) would be considered for the award of the contract and will be called for negotiations if required.

9. Standards of quality

Information and data created according to the Scope of Work should follow internationally accepted standards and practices.

10. Other Terms & Conditions

   i. The proposals should be valid for 90 days after the final submission date.
  ii. CDRI reserves the right to cancel this Request for proposal before or after the receipt of proposals or after opening the proposal and call for fresh proposals. CDRI also has the right to reject any proposal without assigning any reason.
 iii. Proposals incomplete in any respect will not be considered.
  iv. Please note that the Agency must clearly disclose the contractual and payment terms in its proposal.

The agencies are requested to submit their proposal through email to tender.projects@cdri.world by 23:59 hrs (IST) on 20 November 2024. Responses received after the stipulated time or not in accordance will be summarily rejected.

Please ensure that your proposal is sent **ONLY** to ABOVE MENTIONED **email ID** before the closing date & time. Proposals sent/copied to any other email ID (other than above) OR received after the bid closing date & time (mentioned above) will not be entertained.

ANNEXURE I FINANCIAL PROPOSAL

[Location, Date]

To:
[Name and address of CDRI]

Dear Sir/Madam:

We, the undersigned, offer to provide services for assisting Coalition for Disaster Resilient Infrastructure to [Name of the Assignment] in accordance with your Request for Proposal dated [Insert Date] and our Technical Proposal.

Price (prescribed format):

S. N.	Item/Activity	Price	Applicable Taxes (%)	Tax Amount	Total Amount (INR)
1	License Cost of the CRM system as per the scope of work, users, Database licenses cloud infrastructure, etc., (15 Users for a period of **three years**)				
2	Implementation Cost for CRM **system** as per the scope of work along with the data migration from existing systems. (for a period of **three years**)				
3	Technical support cost including change requests (if any) for CRM **system** (for a period of **three years**)				
		Total			

Our Financial Proposal is for the sum of [Indicate currency] _____/- [Insert amount(s) in words and figures]. This amount represents the project's total cost and includes all taxes.

Payment Terms:

S. N.	Particulars	Payment Terms (% of Contract Price)
1		
2		
3		
4		

We hereby confirm that the financial proposal is unconditional, and we acknowledge that any condition attached to the financial proposal shall result in the rejection of our financial proposal. Our Financial Proposal shall be binding upon us up to the expiration of the validity period of the Proposal.

Commissions and gratuities, if any, paid or to be paid by us to an agent or any third party relating to the preparation or submission of this Proposal and Contract execution if we are awarded the Contract, will be solely borne by us. CDRI is not bound to reimburse these expenses to us.

We understand you are not bound to accept any Proposal you receive.

Yours sincerely,

Authorized Signature
[In full and initials]:
Name and Title of Signatory:
Name of Firm:
Address: