Request for Quotation

CRM Replacement for Staffordshire Chambers of Commerce

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# Introduction

## Overview of Staffordshire Chambers of Commerce

Staffordshire Chambers of Commerce is a company membership organisation with approximately 1000 members. The Chamber also offers other membership types, including Finest and Future Finest, which are solely for contact membership. Staffordshire Chambers is one of the 52 chambers in the country, all of which utilise CRM systems, albeit not standardised products. In addition to serving our members, we also run training programmes, grant initiatives, and events that are open to non-members. We also operate a successful daily newsletter with approximately 12,000 subscribers. The Chamber has 36 staff users, with around half of them being core users. We need a system that can manage the different strands of business activity and automate processes as much as possible, making it easier to analyse data and trends. Additionally, we require a system that makes accessing Chamber services easy and user-friendly.

# Requirement

Staffordshire Chambers of Commerce is in search of a CRM solution aimed at optimising daily operations and improving member management. This system must integrate Company, Contact, and Membership information, as well as Event and Training details. It should enable automated marketing to our members, handle room booking reservations, assist our International Trade Team, and manage our annual Awards event, while also overseeing governance and current projects. Furthermore, it should track interactions with businesses and simplify report generation based on sectors, regions, activities, and recent contacts.

The Chambers have a licence for their existing system until September 2024. It would be desirable to have a new system in place and operational before this date.

We require all bidders to submit a proposal addressing all the criteria set out in section 3 of this RFQ. Please note the weighting for each question. The submissions will be scored using these weightings and scoring criteria set out in 2.2 below.

# Responding to this RFQ

Staffordshire Chambers of Commerce is seeking a replacement CRM system that meets the business requirements outlined in Section 4 of this document. Additionally, we require a supplier capable to lead the implementation of the new system and provide ongoing support.

In responding to this RFQ, we ask that you complete the spreadsheet provided with this and answer all the questions in the detailed in Appendix A. This spreadsheet contains detailed requirements for a replacement CRM. For each functional requirement, please state:

* If your proposed system meets this requirement as standard functionality? If so, please state "standard."
* If your proposed system will require configuration or customisation to meet the requirement, please state "configuration" and provide your estimated number of days and cost for completion.
* If your proposed system does not provide the stated function, please state "Not provided."

The spreadsheet includes a comments section for additional information for each function. Please use this to explain further clarification of the solution if applicable.

Finally, there is a list of questions in Section 3 of this document for you to answer. This will help us to understand your company, your approach to implementing the system, your suggested timelines, and how you would support us on an ongoing basis.

## Approach to evaluating your submission

We will carry out an initial scoring on your submission and will invite the top three scoring bids to provide a demonstration of their proposed system (we will shortlist more if the scores are close). We will score the bids using the following weightings and scoring system below.

Table 1 - Scoring Matrix

|  |  |  |
| --- | --- | --- |
| ID |  | % |
| 1 | Technical Expertise and Knowledge | 15 |
| 2 | Approach and deliverability | 15 |
| 3 | Maintenance approach and support options | 10 |
| 4 | Ability to deliver the essentials on the List of Requirements (see appendix A) | 30 |
| 5 | Price | 30 |

Table 2 - Scoring Scale

|  |  |
| --- | --- |
| Score | Definition |
| 0 | Not acceptable |
| 1 | Minimal standard |
| 2 | Satisfactory standard |
| 4 | Meets standard |
| 5 | Exceeds expectations |

We will invite you to give the demonstration of your proposed system to key users across our organisation. We will ask questions and seek clarification to ensure we have confidence that the proposed system can meet our needs. You will also have the opportunity to seek clarifications of our requirements and ask any other questions.

## Approach to evaluating your submission

Demonstrations will be used to support your submission and allow for a review of the proposed system.

Once demonstrations have been complete, the successful candidate will be selected following scoring and moderation of all submissions.

## Timeline for the RFQ process

The following schedule summarises significant target events for the RFQ process. The dates may be changed by Staffordshire Chambers of Commerce at its sole discretion and shall not become conditions of any Contract which may be entered into by us and the Successful Proponent.

Table 3 - Timeline for the RFQ process

|  |  |
| --- | --- |
| **Event** | **Date** |
| RFQ issue date | 15/4/2024 |
| Clarification question deadline | 26/4/2024 |
| Submission deadline | 7/5/2024 – 5:30pm |
| Shortlisting | By 10/5/2024 |
| Demonstrations by shortlisted bidders | 17/05/2024 |
| Anticipated award date | WC 20/5/2024 |

The dates above may vary.

## Further clarification and questions

If, whist preparing your response to the RFQ you have questions, or require further clarification, please send your questions to ryan.dakin@staffordshirechambers.co.uk. We will anonymise your questions and post the questions and answer on to the Chambers website so that all bidders have access to the same information.

The deadline for clarification questions is 26th April 2024.

## Submitting your response

Please send your response by the closing date which is 7th May 2024 no later than 5.30pm to [ryan.dakin@staffordshirechambers.co.uk](mailto:ryan.dakin@staffordshirechambers.co.uk). Late responses may not be considered.

# Responding to the Request for quotation.

Please answer all the questions listed in Appendix A and complete the spreadsheet in Appendix B detailing using the key provided. Please send all the information requested by the 3rd May 2024 no later than 5pm by email as detailed above.

# System Requirements

Please see Appendix B for a full list of our requirements. We recognise that the key functionality for export documentation is unique to Chambers of Commerce, and we understand that it will not necessarily be part of your core functionality.

We would like to understand if your software can be configured to provide this functionality or if, through work with other Chambers of Commerce, you may have provided similar functionality in some way.

# Non collusion

In submitting a bid, the Vendor certifies that they have not either directly or indirectly, entered into action in restraint of free competitive bidding in connection with this submission.

# Contract

The contract will be entered into on the Staffordshire Chambers of Commerce standard terms and conditions which can be found here: [Terms & Conditions](https://staffordshirechambers.co.uk/terms-and-conditions/)

# Appendices

## Appendix A – Response form for suppliers

|  |  |  |  |
| --- | --- | --- | --- |
| **Question Number** | **Question** | **Answer** | **Weighting** |
| 1 | **Background** |  |  |
| 1.1 | Name and address of company |  | For Information |
| 1.2 | Lead contact for this proposal  Name  Email  Phone |  | For Information |
| 1.3 | Brief history of your company, including year founded, corporate structure, head office, main locations, and affiliated companies and their relationships. |  | For Information |
|  |  |  |  |
| 2 | **Technical Expertise and Knowledge** |  |  |
| 2.1 | What is your experience of delivering similar solutions? (Max 250 words) |  | 15 |
|  |  |  |  |
| 3 | **Approach and Deliverability** |  |  |
| 3.1 | Please explain your approach to the configuration and the implementation of your proposed system including any methodologies you will use. (Max 250 words) |  | 4 |
| 3.2 | Please explain what resources you plan to use to undertake the configuration and implementation of your proposed solution, including their roles and the number of days you expect to use of their time.  (Max 250 words) |  | 4 |
| 3.3 | Please detail your proposed project plan, including key milestones for configuration, testing, data transfer, training, and go-live. (Max 250 words) Please include a Gantt chart if preferred. |  | 4 |
| 3.4 | Please explain how you intend to ensure the quality of your implementation.  (Max 250 words) |  | 3 |
|  |  |  |  |
| 4 | **Maintenance approach and support options** |  |  |
| 4.1 | Please explain your support arrangements, including how users will be expected to contact you, expected timescales for response, any SLAs, and hours that your support team is available. (Max 250 words) |  | 5 |
| 4.2 | Please provide a brief overview of the training for all categories of users (i.e., key system administrators, employees, and managers). (Max 250 words) |  | 3 |
| 4.3 | Please provide details of training documentation or tools that will be used. (Max 250 words) |  | 2 |
|  |  |  |  |
| 5 | **Ability to deliver the essentials on the List of Requirements (see appendix B)** |  |  |
| 5.1 | Ability to deliver on the must haves  (Max 250 words) |  | 25 |
| 5.2 | Ability to deliver on the should haves  (Max 250 words) |  | 5 |
|  |  |  |  |
| 6 | **Price** |  |  |
| 6.1 | What is the overall cost for delivering this proposals as set out in the requirement. |  | 20 |
| 5.2 | Please provide details of all ongoing license fees and what level of support is included broken down by hours/days as applicable. |  | 7 |
| 5.3 | Please provide details of costs for additional development after the initial system has been completed and implemented. Provide hourly and day rates. |  | 3 |

Table 5 - Client References and details of similar projects

|  |  |  |  |
| --- | --- | --- | --- |
| **ID** | **Company Contact Details** | **A brief description of the project, highlighting the ability to work with other implementation partners.** | |
| 1.1 | Client Name  Technical Contact Name  Technical Telephone  Technical Email  Executive Contact Name  Executive Telephone  Executive Email |  |  |
| 1.2 | Client Name  Technical Contact Name  Technical Telephone  Technical Email  Executive Contact Name  Executive Telephone  Executive Email |  |  |
| 1.3 | Client Name  Technical Contact Name  Technical Telephone  Technical Email  Executive Contact Name  Executive Telephone  Executive Email |  |  |

## Appendix B – Link to the List of Requirements

[List of Requirements](https://staffordshirechambers.co.uk/wp-content/uploads/2024/04/New-List-of-requirements.xlsx)