## Staffordshire Chambers CRM RFQ Questions and Responses

| Question | Chamber Response |
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| Does the Staffordshire Chamber of Commerce work in Microsoft 365? And if so do you know what license the users hold for it? | Staffordshire Chambers of Commerce uses Microsoft 365 and all users have a Business Standard licence |
| Does the BCC Training Portal have an API? | Awaiting response from the BCC Training Portal |
| Does Awards Force have an API? | Yes, Awards Force has an API with the documentation link here - https://apidocs.awardforce.com |
| What is Quest and does that have an API? | Awaiting response from Quest |
| What are the newsletter workflows and what parameters are needed for the member journey? | The newsletter workflows for our organisation are designed to be versatile and adaptable to cater to the diverse needs of our members across various areas, sizes, and sectors. Workflows should incorporate personalisation techniques to ensure that each member receives content that is tailored to their interests and needs. |
| What email platform do Staffordshire Chambers use? | Staffordshire Chambers currently use Mailerlite and it does have an API - https://developers.mailerlite.com/docs/#mailerlite-api |
| Does SGS/E Cert have an API? | SGS do have an API and I can be found here - https://staffordshirechambers.co.uk/wp-content/uploads/2024/04/SGSWebAPI_v1_4_eCertOnly.pdf |
| How would Staffordshire Chambers want to link to Zoom/Teams? | Staffordshire Chambers would like to be able to create an online event on the CRM or Zoom/Teams and then link back to the other system and create the event so that there is no duplicating workflows |
| How many users are in each department? | Some will need to access multiple departments.<br>Marketing - 6<br>Events - 4<br>Operations - all users (36)<br>Finance - 4<br>Admin - 4<br>Reporting - all users |
| Can you advise what your supplier criteria is in this assessment? E.g. any accreditations we need to have in place? | The ideal candidate should have ISO9001 and ISO14001 but this will not be detrimental to the application. |

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| Is the expectation to have everything completed and live by September or just part of the solution? | This will be judged through the tendering process. |
| Please can you explain what integration is required and for which components of MS Office. If we allow exports in word and excel formats, is this sufficient for the CRM? | Importing from Excel will be sufficient |
| Does full integration mean receiving and sending from all user Microsoft email accounts from within the software. If so, do you have mail hosting details? Alternatively we could send only from the system using the users own accounts or a system account. | This can either be sent from the CRM which links to the users email or sent from their email and will link to the CRM to track activity |
| For tasks, If we can provide tasks from within the CRM, will Microsoft tasks still be required. | No, if tasks can be made and assigned in the CRM then no external platform will be needed |
| Are there specific systems or will a csv import suffice? | A csv import will suffice |
| Would the super users need a front end way to make changes or would this be done through direct database access. | The ability to do both would be good. |
| Are there any plans to allow other Chambers of Commerce to be given access to use the system as thei rown CRM system, as this would be substantial increases in load compared to organic growth. | We cannot guarentee this, therefore this will not be judged through the tendering process |
| Can you confirm what is meant by data ownership rights in this context. | We want to know who will own the data that is stored, either you, the supplier, or us, the Chamber. |
| Is this standard WordPress functionality or is it through plug-ins - if so which ones and can we integrate using the WordPress API? | This can be achieved either through custom development on the site which can be discussed after the tendering process if the winning tender requires this or this can be done using APIs to the current system (Events Calendar Pro and a custom built member directory) |
| Are we able to provide an alternative to Typeform to create forms from our own system? | Yes if the supplier finds a solution which will improve the process |
| Can you confirm the level of your existing Zoom account to ensure we can get API access | The Zoom licence we have is called "Licensed" |
| Do you know how many Xero accounts and how the transactions are separated between them? | 2 Xero accounts and currently these are split by type of invoice |
| Can we provide our own forms via the CRM? | Yes |

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| Is this required through the API or are users able to log in to MailerLite to manage sending? | Users can log onto MailerLite but all lists will need to be updated each time and clicks and opens tracked and displayed on the CRM |
| Can you clarify how Automated emails may work? | An example is once a member books an event they will receive an automated booking confirmation. |
| Would newsletters need to be created on the CRM or would this be done through Mailerlite? | Through MailerLites newsletter builder |
| Would this be just from CRM generated emails or those from Mailerlite as well? (email deliverability & A/B Testing) | Both |
| Would email lists be held in Mailerlite? | Yes will be held in MailerLite but updated by the CRM |
| Does a subsidiary membership have a single parent membership that it is linked to. Are there any differences between main membership and subsidiary membership? | Yes, there is a slight decrease in the cost of membership for subsiduary companies |
| Will displaying marketing communications be tracked from MailerLite? | Ideally yes |
| Is it expected that invoices will be raised in the CRM and then posted to Xero. Will payment information (from Xero) need to be passed back to the CRM? | Yes |
| Would displaying relationships with other companies within the same group be multi-tiered? | Yes so we can see which companies are linked to their other larger companies |
| Can you clarify what a project is in this context? | We run 16 public funding projects and will need to track the activities, whether that be phone calls, the amount of funding a company has received etc |
| Is there just one primary contact or could there be different ones for different functions/roles eg primary accounts contact, primary training contact? | There can be multiple primary contacts for different areas of the business |
| How will we know which member benefits have been received - will these be manually entered? | Manuaally entered alongisde a csv sent from our suppliers |
| Log financial transactions - Will these be from Xero or from the CRM? | These need to be shown on the CRM but then will be accessed by accounts on Xero |
| Logging contracts - Will these be manually uploaded. Are they on your current CRM and will they need migrating? | Uploaded manually and not on current CRM |
| Will a company raise a complaint online? Will the viewing of this information be limited | This can be either a phone call or a form on the website but these can then be hidden to certain users |

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| Archive information like turnover - How would this information be obtained and added to the CRM? | This can either be optained through companies house or a manual process |
| Will contact memberships just be based on name, for example a contact could have different memberhips with different email addresses | Just on name but we will only assign memberships to a contact with a company email if applicable |
| Would a contact be able to log into the system to amend communication preferences? | Yes |
| Would admin users be able to view locked information? | Yes |
| Identify members with low or no interactions and use RAG Ratings - Will you want to amend the criteria for this? | Ideally yes |
| Will past event lists need to be uploaded or is this just for new events? | We need to see who has attended past events but only live ones will need to be displayed |
| Is there a reason why invoices can not be transferred on creation? | Some companies do not have a Xero account code created. |
| Is the lifetime report on value just based on subscription income or other income such as training and events. | Everything, members get a discount on events and training so we would like to see how much they have saved |
| How will marketing spend be tracked on the CRM? | If possible yes |
| How will the project activities be added? | Just as activities manually onto the CRM |
| Export Docs - Are documents to be created on the CRM or are we just collecting data to send via the API for the documents to be generated and sent back to the CRM? | Documents are not created on CRM but they are then downloaded from Ecert to the CRM, which will track if they have been rejected and add a fee. This will then be added to an advice note which, once we invoice, will invoice the customer for the full amount on all advice notes |
| Do DD payments need to be transmitted to a provider. Do you currently use a DD provider? | They do and it is Go Cardless |
| Do you have a payment solution provider for events? | We currently use Stripe for online payments and we also invoice for some delegate places too |
| is Xero set up as multi currency? | Not yet |
| When applying late fees - Will you want to change the predefined rules and/or percentage rates? | Yes |
| Would board members need to be able to log in to update the matrix? Will it be necessary to add and remove skills? | No that will be done internally |
| Can this be via an embed on the website for events? | Yes |
| Do you already have a payment solution for events? | Yes, Stripe |

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| When making instant content changes for events - Can you clarify what this means and what kind of content? | Event details on the website need to be changed automatically once they are changed on the CRM so that old information is not showing |
| Do you have payment solutions for card paymnts and/or direct debit? | FDMS and Stripe for card payments and Go Cardless for direct debit |
| What is the existing system? | It is a custom built CRM |
| Does the existing system support data extract? | Yes but via a copy and paste link to Excel |
| Will the existing system provider be accessible during implementation and transition? | Yes |
| Are the incumbent bidding or is their an option to remain with the existing system or improved/updated version. | If the current supplier wishes to consider this we will support any options |
| Is the preference a system that fits off the peg with lower upfront costs or one that more tailored and adaptable providing a lower total cost of ownership? | There is no preference and all submissions will be judged against the criteria |
| Pricing plays a siginificant part in evaluation. Our solutions can provide features covering small to enterprise scale and a significant breadth of coverage. Is it possible to provide an indicative budget so we can shape what products and features we propose for this RFQ? | We are not inclined to give a budget as this will depend on the system that is presented |
| How many tickets are raised each month on average? | This will depend if the system is built so we don't need to raise support tickets |
| What is the breakdown of tickets by any categorisation you currently use such as incident, problem, access? | Access should be able to be controlled by admin users, with a easy to use CRM we would hope that incident and user error will be low and again problem we are hoping to be low |
| Do you want the support provider to manage all dependent suppliers for a ticket or will you coordinate the suppliers? | This can be negotiated |
| Do you have an in-house team that will handle some of the tickets? If so what percentage/type would they handle. | Yes, in house will take all tickets and try and resolve |
| How stable/modern are the dependent systems which will be integrated? | All systems are well known and well used |
| What support agreements/SLA's exist for dependent systems? | These are all licenced products with sufficient support levels |
| Their are a number of systems, such as Typeform, that have been bought to provide application features which I assume are not present in the current CRM. Is their an architectural view of how these systems work together to deliver the business services? | If there is a system that can remove the need for the external systems then that would be preferred as long as they match the value if not add more to the current solution. |

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| Would you consider replacing MailerLite if the solution provides features required. | Yes |
| This is a complex domain requiring complex data structures. Would you consider a 3rd party export solution that was integrated? | If it will work with our Export Documentation team and what they need to do then yes, it will still need to link to E Cert |
| A number of finance requirements are more common to a finance system. Would you consider replacing Xero or 3rd party extensions to Xero to provide these features? | No we would like to retain Xero |
| Can the submission deadline be extended? | Yes, the deadline has been extended to Tuesday 7th May at 5:30pm |