

Request For Proposal

Customer Relationship Management (CRM) Requirements Definition & Analysis

Issued by:

Atlantic Canada Aerospace & Defence Association



ISSUE DATE: June 22, 2020
PROPOSALS DUE BY: July 3, 2020

Our Background

The Atlantic Canada Aerospace & Defence Association (ACADA) is a Pan-Atlantic non-profit association with a mandate to provide a unified voice for the Atlantic Canadian aerospace, defence and security industries and to promote and support the development the regional sector.

ACADA has a core staff of 8 team members across the region and a membership composition of approximately 170+ industry members and partner organizations.

Project Overview

ACADA, now in its fourth year of operation, is seeking to implement a Customer Relationship Management (CRM) solution to effectively manage and track client contacts (members and partners) and to optimize communication, engagement, and related processes. In addition to the client management aspect, ACADA hopes to be able to identify a CRM solution that will optimize and/or automate some of its internal and online administrative processes

ACADA is seeking professional support to assist in developing the CRM system requirements, including an analysis and recommendation of an appropriate system platform to address our organizational needs and project goal.

Scope of Work

The goal of this project is to identify an effective and intuitive CRM system for ACADA's implementation. The high-level scope of work for this project includes:

- I. Definition of CRM requirements
- II. Research and assessment of possible solutions (against defined requirements)
- III. Recommendation of solution (including platform and implementation costs, training, support costs and schedule)

Please note: ACADA is not obligated to the selected vendor for any subsequent effort resulting from this statement of work (if any).

Target Deliverable Schedule

The expected project completion date is **August 7, 2020**. If this date needs to be adjusted, please include your revised proposed date, as well as your rationale for doing so. All proposed date changes will be considered.

Project Challenges & Risks

Possible or anticipated project challenges and risks may include:

- Project timelines and availability of vendor/ACADA project team members due to summer vacation schedules.
- Project team interaction/inability to meet face-to-face due to COVID-19 restrictions.
- Ability to identify an "all-in-one solution" to meet desired requirements.
- Platform/implementation costs (must be clear and in line with ACADA budget).
- Implementation barriers including technology adoption, change management and staff training (implementation phase).

Budget

The budget for this project must not exceed \$10,000 (exclusive of applicable taxes).

Evaluation Metrics

ACADA will evaluate bidders and proposals based on the following criteria:

- Previous experience/past performance history.
- Samples and/or case studies from previous projects.
- Acknowledgement of potential project risks and proposed solutions to address or minimize these risks.
- Projected costs.
- Experience and technical expertise.
- Responsiveness and answers to questions in the next section.

Submission Requirements

Bidders must adhere to the following guidelines to be considered:

- Only bidders who effectively demonstrate compliance with the evaluation metrics should submit a proposal.
- Proposals must be received by July 3, 2020 via email to the Project Lead, Lisa Clory, at lisa@ac-ada.ca. Bidders who are interested in submitting a proposal should inform the Project Lead on or before June
- Proposals should not be more than 15 pages. Failure to comply to this guideline may result in an automatic rejection.
- Proposals shall include;
 - Company history, including relevant work examples and references.
 - Plan for delivering statement of work.
 - Project team members and related roles.
 - Proposed project schedule including related milestones and deliverables.
 - Budget.
- Bidders must disclose if they have an existing relationship or connection with any software solutions that may be included on the options and recommendation regarding platforms.

What We're Looking For in Potential Vendors

Our ideal vendor is an Atlantic-Canadian business with reputable history and experience in delivering projects of this nature. The contractor must be committed to the goals and success of the project and to ensuring the project remains on task, schedule and budget. The contractor must be committed to an open and consistent collaboration and communication approach with the ACADA project team.

Contact Information

For questions or concerns connected to this RFP, we can be reached at:

Lisa Clory, Project Lead

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