Your Company Name

Company Logo

Request for Proposal: CRM Software

RFP #

Attention: Project Manager Name

Title
Address
City, State Zip
Phone
Email

Information contained in this document is proprietary. You have been provided a copy for the sole purpose of preparing a proposal.

Contents

Section 1: Executive Overview

Your Company History

Insert background information on your company and the purpose and business objectives of the proposal. For example, this could be the replacement of a current outdated PC-based contact management system, increased support for field sales force, centralize customer data, support growth rates of 30% year, provide better customer service, etc.

RFP Overview

Include items such as the type of users, (in-house, remote, sales, marketing or service), number of locations, total number of users, geographic location of users, i.e. U.S., Mexico, Canada, language requirements and currency requirements.

CRM System Requirements

Clearly describe the primary requirements of the new system.

1. Integration requirements: to your other business and third-party systems.

2. Business process support: What business processes will your CRM system support: sales, contact management, field service, help desk? How many customer records?

3. Platform requirements:
   - Operating Systems
   - Application Servers
   - # of users supported
   - Availability
   - Data security

Section 2: RFP Schedule

Activities Schedule

TASK	COMPLETION DATE
1. RFP issued to selected bidders.	Date
2. Bidder clarification questions submitted.	Date
3. Questions and answers returned to bidder.	Date
4. Proposals due.	Date
5. Contract awarded.	Date
6. System implementation	Date

Delivery Instructions

Please send one (1) original copy of your completed RFP to the address below. Your RFP must be received by Your Company Name by time, date. In addition, please send one (1) electronic copy to: email. Email copies are subject to the same deadlines and received by dates as the hardcopy responses.

Company Name
Department
Attention:
Address
City, State, Zip

It is the bidder's responsibility to delivery their proposal on, or before this deadline. Proposals received after the time specified will be considered late and may be disqualified at Your Company Name's discretion.

Completion Instructions

Bidders are responsible for making a careful examination of the scope of this RFP and to comply with all terms and requirements. Bidder must supply concise answers to questions within this document. References to external documents or Web sites will not be considered. Failure to address any of the requirements in this RFP could subject the Bidder's proposal to rejection.

All bidder responses to this RFP become the property of Your Company Name. We reserve the right to use any information in this proposal to Your Company Name benefit.

The RFP number must be identified in your proposal, and the proposal must be signed by an authorized official of your company.

Your Company Name reserves the right to issue revisions in writing to this RFP at any time prior to the closing date.

Standard Provisions

Proposal submitted in response to this RFP should not be construed as an obligation on the part of Your Company Name to award a purchase order and/or contract. Proposals submitted in response to this RFP will be considered firm offers for a period of 120 days from bid close date. However, in the event Bidder reduces the price of any item or service provided in their initial bid responses,

Bidder agrees to immediately pass these reductions on to Your Company Name by submitting a revised proposal. Bidder warrants that prices provided in your proposal are no greater than prices being charged any other customer for similar items, quantities and schedules with similar specifications.

Section 3: Bidder Company Background

Provide a brief overview and history or your company. Describe the organization of your company and include an organizational chart. Include specific data outlined below:

- Bidder Company name and address
- Contact name, title, address, email, phone
- Headquarter address (if different)
- Local sales address (if different)
- Years in business under this name
- Previous company name(s)
- Years in business under previous name(s)
- Ownership structure?
- Total number of employees?
- Number of on staff developers
- Number of full time technical support staff?
- Number of professional services staff?
- Long-term business strategy?
- List your five primary product offerings, ranked by contribution to revenue.

Section 4: Financial Performance

- Provide financial information on your company, i.e. annual report, 10-K.
- What is your profit growth history for the past three years?
- What is your average ratio of implementation services versus annuity business (for example, maintenance contracts)?
- Attach a recent Dun & Bradstreet report

Section 5: Functionality Requirements Matrix

Use the codes below to indicate your level of support for each of the features in the functionality matrix.

SUP	Supported as delivered "out-of-the-box"
MOD	Supported via modifications (screen configurations, reports, GUI tailoring, etc)
3RD	Supported via a third party solution
CST	Supported via customization (changes to source code)
FUT	Will be supported in a future release
NS	Not supported

Software Function / Requirement	***Support Level***	***Notes***
Sales Force Automation (SFA) Functionality		
Example	*SPU*	*Use codes from the table above to indicate support level.*
Contact management		
Opportunity management		
Account management		
Territory management		
Product configuration		
Pricing		
Quoting and proposal generation		
Order tracking		
Access to marketing materials		
Lead qualification and management		
Calendaring and scheduling		
Dynamic scripting of cross-sells and up-sells		
Lead routing based on analysis of lead data		
Global forecasting		
Data quality management		
Sales Reporting Metrics		
Number of prospects		
Number of new customers		
Number of retained customers		
Number of open opportunities		
Close rate		
Renewal rate		
Number of sales calls		
Number of sales calls per opportunity		
Amount of new revenue		
Amount of recurring revenue		
Time to close by representative		

Margin		
Days sales outstanding		
Revenue by representative		
Profit by customer		
Number of sales calls made		
Deal margin		
Customer Service (Call Center) Functionality		
Telephony integration		
Web self-service		
Calendaring		
Workflow integration		
Call Logging		
Log requests that capture call details		
Call prioritization system		
Call tracking		
Automatic call escalation		
Identify prior caller ID and provide access to complete account history		
Automatically assign trouble ticket numbers		
Convert emails automatically into an open call		
Role and skill-based case assignment		
Call Action		
Provide scripts as to best course of action		
Automatic logging of all customer interactions		
Track the status of open calls		
Document call actions in history file		
Knowledge-base support		
Generate a to do list for open calls		
Automatic call close-out		
Automatically send a pre-defined email message to callers		
Automatic generation and distribution of user satisfaction questioner		
Help Desk Reporting Metrics		
Complaint time-to-resolution		
Average number of calls per day		
Average response time		
Call duration		
Abandoned call rate		
Wait times		
Cost per contact		
Number of calls handled per agent		
Field Service Functionality		
Appointment booking		
Automatic assignments based on availability, skills, location, task, etc.		
Scheduling and dispatch		
Wireless and mobile field service delivery		
Inventory parts and logistics		
Service contract management		
Remote inventory checking		

Field Service Reporting Metrics		
Cases closed the same day		
Average number of service calls per day		
Field service repair time		
Customer satisfaction level		
Complaint time-to-resolution		
Marketing Functionality		
Email campaign generation and tracking		
Integration with sales application for automated lead conversion		
Campaign management		
Auto response Email		
List segmentation and management		
Marketing Reporting Metrics		
Number of campaigns		
Number of responses by campaign		
Number of purchases by campaign		
Revenue generated by campaign		
Cost per interaction by campaign		
Number of new customers acquired by campaign		
Customer retention rates		
Number of new product leads generated		
Number of customer referrals		
Content Management		
Content creation, posting, electronic distribution		
Single source product catalog, sales literature library		
Ability to attach client documents to opportunities or cases		
Data Interfaces Functionality		
Compliant with LDAP		
Compliant with CORBA		
Compliant with COM		
Compliant with ODBC		
User Functionality		
Language support for English		
Language support for French		
Web Interface		
Remote synchronization via FTP		
Database access while disconnected from the server		
Database and application access via a Web interface?		
Remote synchronization via email		
Web access password protection		
Customizable user interface		
Keyword searchable online help		
Integration/Interface Support		
Prebuilt interface to HR insert your required interfaces.		
Prebuilt interface to financial system		
Prebuilt interface to ERP		
Architecture		

Wireless technology support		
Handheld platform support		
Networks supported: -PC LAN Server -Novell		
Support for Server Operating System (s)		
Apple Mac OS X		
MS Windows 98		
MS Windows NT		
Unix		
SunOS		
Support for Client Operating Systems		
Apple Mac OSX		
MS Windows 98		
MS Windows NT		
MS Windows 2000		
Unix		
Hosted/online		
Application Service Provider (ASP)		
Software - General		
Open License with ability to add additional stations in current and other warehouses		
Modular software package to enable purchase of additional modules as required.		
24 x 7 support		
Source code available		
Customer can apply releases and upgrades supplied by vendor		
Published release schedule		
User fields/function keys to allow easy customization		
Is the ability to create end-user specific "views" provided by the proposed software?		
How many users per application server are supported by the proposed software?		
Hosted/web-based software license		
Other		

Section 6: Proposed Solution Recommendation

Description

Describe the recommended solution, including the following:

- Product name(s)
- Primary features and benefits
- First release date
- Next release date
- Is the proposed solution
- How many sites are currently using the proposed system

Budgetary Pricing Estimate

Budgetary quote for your CRM solution**.** Bidders should provide detailed, line item pricing for all items included in the proposal. This should include a detailed item description, quantity required, list price, extended discounted price. Support services, professional services, integration, customization and any travel or other costs should be identified separately.

Annual maintenance costs should be identified as separate charges.

Total Cost of Ownership

What is the estimated three year total cost of ownership for the proposed solution? Please provide details of your calculation process.

Section 7: Implementation

Overview

Provide a brief overview of your professional and integration services organization.

Methodology and Tools

Include a description of your methodology, tools used to manage the project, change control procedures, and common communication methods.

Project Timeline

Identify elapsed time and key dates for completing this project.

Project Team

Provide a biography of team leader and all key employees to be assigned to the project. Identify required Your Company Name resources.

Fee Structure

Section 8: Training Services

Describe your company's training services and methods for delivering training. Is training curriculum tailored to implementation specifications or is it generic?

Section 9: Customer Support

- Describe your company's ongoing support and services.
- What are your support hours? Average response time?
- Type of issue tracking system?
- Availability of on-site support and troubleshooting?
- Average response times for bug fixes and enhancement requests?
- How is documentation provided?

Section 10: References

List five reference accounts. Include one that has been using your system for over five years, one that purchased within the last year, and one that is has [identify your specific requirements – integration to a specific solution, industry, organization size].

Include the company name, contact name and title, phone number, email address and brief project description for each reference.

References must be willing to discuss the technical and performance aspects of the Bidder's installed solutions(s) with Your Company Name.