

CRM and marketing automation system

ActionAid Denmark

Request for Proposal

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1 Copyright Information

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2 Document History

Version	Date	History	Name
01	13-04-2021	Original	Pierre vernet
02	21-02-2023	Adjusted	Sarah Grøn
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04	09-03-2023	Adjusted schedule	Sarah Grøn

3 Organization Information

AADK has almost 70 years of experience with development work and our work aims to improve poor people's conditions of life, in order for them to manage without support in the long run. Our target groups are primarily women and youth.

Together with local organizations we work to empower people living in poverty or exclusion and support them in knowing and demanding their rights, in order for them to build democratic and sustainable societies. We do it both abroad and in Denmark.

As part of the international alliance ActionAid we work with human rights based development in more than 40 countries and reach more than 25 million of the world's poor.

Above working with partners to empower people living in poverty and exclusion, we do campaigning and policy work, develop social entrepreneurship projects and fundraise to support our activities and humanitarian work as well.

ActionAid Denmark (AADK) is a membership organisation with above 20.000 members and individual donors and gets funds from Danida, EU, other institutional as well as private funds.

More information on the organization will be made available upon request or can be accessed through our website www.ms.dk

4 Current Situation Overview

AADK has grown exponentially in members and private donors in the recent years. We are highly dependent on systems and technology to deliver the key strategic objectives and the outsourcing partner will play a key role in supporting our ambitions laid out in our strategy to continue this growth.

The Supporter Fundraising team will be the first team to move into Microsoft Dynamics. Afterwards, other teams will follow (see the specifications for further information on this). The Supporter Fundraising team receives donations from members and private donors. This can be monthly donations, annual donations or single donations for either earmarked or non-earmarked appeals.

We communicate to more than 100.000 persons. Some of those have signed a petition, others are members and some have donated to one of our appeals. Some have done all of these.

Based on our knowledge of these +100.000 persons, we communicate with them. One might receive an email with news about a petition, he signed. A thank you email goes out to another for her donation. A segmented group of those who has shown an interest in climate receives an email or sms urging them to support our work with a climate specific angle. Members receive news about the achievements of MS. All this work is today based on manual SQL requests. We want this to be part of a marketing system integrated in a new Dynamics setup.

Another crucial setup today is how we handle leads. A person signs a petition, this person is washed in the database clarifying if the person constitutes a lead. If it's a lead, the lead is sent to telemarketing (an external supplier) and called to see if the person wants to become a member. We also have winback and upgrade programmes running via telemarketing.

Underneath this work lies stopfiles securing that people's privacy wishes and GDPR regulations are upheld.

5 Project Purpose & Scope

5.1 Programme Objectives

This Request for Proposal (RFP) is established on behalf of AADK to replace our current data and email setup and replace it with a new one.

The new solution ought to replace many manual procedures with automatic ones, allow more segmented communication flows and be one unified entry point from where SMSs, emails and data are gathered. To the backend user, the sending of emails and SMS will be created and sent through this Dynamics solution, although effectively SMS will be sent from Online Fundraising and emails from ClickDimension or Microsoft 365.

5.2 Project Scope

Concretely, we want to replace our CRM system Donorfy, datamart and email system MailChimp with a unique Dynamics solution with an integrated marketing automation system that can either be ClickDimension or Microsoft 365. We lean towards the latter, because we can best see this system fit our demands as mentioned in the specification, but we are open to the idea of using ClickDimension as well.

The Dynamics solution needs to be integrated with our Online Fundraising solution as well as our finance setup in Business Central on Microsoft online.

After the successful implementation of Dynamics in the Supporter Fundraising Team, ActionAid Denmark is looking to migrate other systems used in other teams (e.g. FileMaker or Podio registers) or to integrate to other systems (e.g. booking system) into the Dynamics solution. This means that the possibility to support further developments or integrations is part of the project scope, while these future projects will be managed separately as a new procurement round directly with the selected supplier to deliver on the CRM and marketing automation system.

The procurement also covers a service agreement to run after the implementation.

About pricing, we prefer to avoid a fixed price for the development and installation, whilst also ensuring to have a viable product delivered within budget and to the agreed deadline.

6 Requirements Detail

Overall, the solution needs to be based in Dynamics and use either Microsoft 365 or ClickDimension for emails and SMS. Integrations with Online Fundraising for payments, creation of subscriptions and SMS, and with Business Central are part of the requirements.. The Dynamics solution needs to be open to some manual changes such as inserting payments received to a bank account instead of through Online Fundraising, as well as the manual export of leads. For more details, please see the specification.

The precise required specifications are noticed in the Annex 1 “Kravspecifikation”

Language: Danish and English will be used indifferently in our everyday correspondence with the selected supplier, and the supplier must be able to manage both.

7 Vendor Instructions

ActionAid Denmark doesn't cover expenses for responding to this tender.

When responding to this, we want to receive the following:

1. A general presentation of the solution
2. Arguments for whether you would recommend the use of ClickDimension or Microsoft365 for the solution and specifying whether your proposal would use one or the other – or whether it could be any of them. In case you suggest another system, you need to specify why this is the case.
3. A description of the solutions that address each scenario mentioned in the annex 1.
4. A description of the vendor's approach and methodology for the development and implementation of the solution.
5. A description of the vendor's team in the project and the resources allocated to develop and implement the project incl. descriptions of the team members experiences with such projects. In this description, please describe how you will manage sickness or the like within your team and still meet the agreed deadlines.
6. A proposal for project timeline, incl. eventual recommendations concerning priorities among the different modules/solutions.
7. A description of the resources AADK should expect to provide along the development and implementation incl. probable schedule.
8. How eventual changes during development and implementation will be managed (incl. what will be considered as small adjustment and what will be considered as changes impacting costs).
9. Proposal for Service Level Agreement.
10. Price structure and specific prices for the:
 - a. Development and implementation
 - b. Management of change requests
 - c. Service agreement
11. Evidence of your experience with working with other Danish NGO's building their Dynamics solution and specifically the integration with Online Fundraising
12. References that can be contacted by AADK Head of fundraising and Head of Compliance and Systems.
13. Filled questionnaire upon Responsible Business Conduct (Annex 2).
14. The proposal can be delivered either in Danish and English.

7.1 Schedule for Evaluation Process

The expected timeline for the evaluation and decision-making process is as follows.

Process step	Date
Tender documents published	3 March 2023
Opportunity for posing questions to ActionAid Denmark	13 – 27 March 2023
Deadline for responses	31 March 2023
Vendor interviews	24 – 25 April 2023
Selection of vendor/contract negotiation	26 - 27 April 2023
Contract negotiation and planning of process with selected vendor	28 April till latest 10th May, but hopefully 1 st May
Contract begins	Hopefully 1st May and latest 10th May

7.2 Proposal Submission & Contact Information

Please submit electronic copy of your quote/proposal, including all supporting documentation to this e-mail address:

procurement@ms.dk

Contact Person(s) for any questions about the RFP by e-mail only:

Sarah Grøn ssg@ms.dk

7.3 Proposal Format

A vendor's internal template for responses to RFP will be accepted. The Questionnaire upon Responsible Business Conduct provided herewith has to be answered and attached along with the quote/proposal.

7.4 Notifications

Vendors will be notified regarding requests for additional information, formal presentations, and the outcome of the selection process through e-mail.

8 Basis of Award

All proposals become the property of AADK and will be evaluated by a Procurement Committee. Evaluation and selection of vendors to provide products and services as defined in this RFP to AADK will be based on the following criteria, which are given in no specific order.

- Price and price structure
- Proposed solution and support terms
- Development and implementation plan incl. time plan
- Time taken to have a working solution in place
- Depth of overall experience
- Proven NGO experience: Vendors with a proven track record of implementing Dynamics solutions for Danish NGO's will be considered first.
- Online Fundraising experience: Vendors with experience of integrating to Online Fundraising will be considered first.
- Experience with implementing ClickDimension or Microsoft 365 in Dynamics and argumentation for why one of the two systems is the best suited to meet our needs specified in the specifications.
- Expertise of proposed team
- References

- Company history and stability
- Cultural fit
- Quality assurance offered
- Timely and complete response to RFP
- Language ability: The ability to communicate both in Danish and English with provider

Weighting to scoring will be determined along these areas:

Solution 30 %	Price 30 %	NGO Experience 15 %	Online Fundraising Experience 15 %	Cultural Fit 10 %
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The Procurement Committee reserves the right to accept or reject any or all RFQs/RFPs received.

The Procurement Committee is comprised of AADK's Operations Director, the Head of Finance, a Technical Lead and the procurement lead.

AADK reserves the right to negotiate with respondents to this RFQ/RFP, within the requirements of the FRQ/RFP, to best serve the interests of AADK. However, vendors must not assume an opportunity to negotiate and are cautioned to submit their proposals on a best and final basis since an award or decision is likely to be made without further negotiation based on pricing and terms of the original submittals. Accordingly, all requirements must be included with your initial offer.

All proposals submitted will be considered to be proprietary by AADK and will not be released to any outside party, in part or in total unless required by law. Neither the transmission of this RFQ/RFP to a prospective bidder nor the acceptance of a reply shall imply any obligation or commitment on the part of AADK.

If vendor needs to take exception to anything under the RFQ/RFP, these exceptions must be clearly identified on the FRQ/RFP response.

All prices and conditions must be shown.