

We would like to know if an SMME has skills to deploy the technology but don't have enough references. Can we partner with a company that is well established and have all references needed? – You may and provide a Joint Venture agreement.

Can a company who didn't attend the briefing be prime respondent when partnering/subcontract a company that attended the briefing? – Yes the company may be a prime respondent – the briefing session is not a disqualifying criteria

In a case of JV must there be a joint TCC or not? – Yes, it is required.

Does financial statement requirement a pre-requisite for SMMEs' as well? – Should you not be required to produce audited financial statements, please do provide a formal letter indicating so.

When is the Implementation expected/ preferred to commence? – May 2022

Will this be a phased approach implementation, if so, what is expected initially? – Yes, with a mix of agile. Everything mentioned in the RFP is in scope for first phase.

How many 3rd party systems are we integrating to? – 5 systems for the first phase.

System Records and System Insights are mentioned in the RFP document, Are these On Premise or Online? - We have few On-Prem and in the Cloud. The strategy is to move to cloud fully.

"Post Implementation Support" is noted in the doc as 36 months and the total contract period is 36 months, and the pricing table asks for 18 months pricing fee/schedule. Can we please have clarity on this? – Refer to the RFP document under fee structure section. The RFP clearly states 36 months in the pricing table.

Do you have Office 365 currently? And what version or plan is it? – Yes, M365 E5

Point 6 in the doc refers to "Data on Maintenance Agreements", does this refer to the details of our maintenance agreement offering/cost? - Yes

Data analysis and conversion under the Implementation fee, does this refer to data cleansing and formatting to migrate to the proposed system? - Yes

Will this be a "Fixed Cost" or "Time and Materials" project? - Fixed

When mentioning Customer, we assume this would be for example a pensioner, Is this a correct assumption? (As we assume a User will be an employee utilizing the proposed system solution to assist said pensioner) - Yes

Is there a requirement for a portal that is customer(example: Pensioners) facing? – There's a bespoke portal in place already for EPPF members. However, there will be integration between CRM and that portal.

Do we have volumes of people to market to via sms and email? – Approximately 80K

Do you have a current sms provider to integrate to? - Yes

Is WhatsApp integration a requirement for the proposed case management solution? - Yes

Is Customer Data stored on prem or online and how large is the data set? – We have data stored both on prem and in the cloud.

Are the systems to integrate to on prem or online if some are on prem and some online, can we please have the list of these. – Refer to point 7 & 15. More inform will be provided to bidders that proceed to the second stage of the process.

Do we have api's available to connect to these systems? - Yes

Are we expected to do a "skills transfer" to the people the bidder is expected to work with for system maintenance? - Yes

"How is EPPF managing the accounts and other details in the absence of a CRM system? – EPPF does that by using bespoke systems of engagement solutions and COTS system of Record systems.

What are the challenges EPPF is facing w.r.t their case management system while managing pensioners' details?" – Not relevant to this phase of the RFP process.

What is your strategic and tactical objectives out of this CRM implementation? – Refer to overview section of the RFP document.

Will CRM system be a prime source for other Customer Related Systems or will the centralized data be in data warehouse or any ERP system? – Yes, CRM will be the primary source for member related information and engagements.

Is there an existing ETL/middleware tool which can be leveraged for the integration requirements? – The Fund is busy with Enterprise Integration Platform as a Service to address all integration needs.

"We understand that following systems are in the scope for integration- Risksystem, ECM, Pension Administration system, EPPF Data Platform as a Service, SMS gateway, Email service, Contact Centre System, Document Management System. Can you provide following info w.r.t integrations:

Type of integrations- real/near real time/batch - Mix

How many entities would be integrated between CRM and these systems – This will be determined at analysis phase of the project for successful bidder.

Can you provide more details on Document Management system? What document management System is currently used by EPPF? Do you expect to migrate all documents to CRM platform?" – Documents will not be migrated to CRM system. ECM will be our primary system for DMS and CRM will have ECM integration.

"What is the current call centre used by EPPF? – Smartz Solutions

Is it integrated with the case management solution? Please provide details?" – No, not at the moment.

"Provide following volumetric information:

Details on systems from where data needs to be migrated. Ex: Case management solution – Refer to point 7

Are there any data transformation/duplication/quality rules that needs to be applied for data migration? - Yes

What is the volume of records which needs to be migrated?" +80k member records, accurate information will be available during analysis phase for successful bidder.

Is automation testing part of the scope of this RFP? Pls confirm. - No

Is security testing part of the scope of this RFP? Pls confirm. - Yes

Is performance testing part of the scope of this RFP? Pls confirm. - No

Are there any automation/performance/security testing tool available with EPPF? Ex: Selenium, JMeter, etc." - No

Are there any AA/AAA accessibility requirements (For specially abled people)? – No, not for this initial phase

Will the Salesforce mobile app be used by end users (ex: pensioners) to view their fund value and other service requests? Or is there any other business purpose or using this app? Please provide details. – EPPF has its own custom-built mobile application and does not use Salesforce platform.

Do you need ability to make Reports and dashboards available on mobile? - Yes

Are the users using any existing Mobile App (for reference) or do they have an inclination towards any standard Mobile App which can be referenced to design the User Experience. Current members are using the mobile app for self-service engagements.

Do the users want the same user experience on Mobile as that of existing Website? – N/A

"Is EPPF looking to build a portal for all its pensioners (80K user base) to access the details on their pension funds, raise a service request/query, download documents, etc.? – Member portal already exist.

Or the use of new CRM system is applicable only to ~30 internal EPPF users? Please clarify." – CRM system will be available to internal staff with integrations to all digital channels and customer touchpoints.

If the response to above question is no, please provide details on the existing portal which is used by EPPF's pensioners for all these activities. – Portal is bespoke solution

"What are the different channels through which marketing and campaigns will be conducted? – Email, SMS, Video, Social Media & conversational platforms etc

What is the business/use case for these campaigns?" – N/A

"Have you identified the analytics requirements? – Not yet, this will be done on the analysis phase for successful bidder.

Ex: Is it to develop a reporting system with drill down capabilities or to build predictive analytics leveraging AI/ML? "

We assume EPPF has outlook (for email) and Active Directory mechanism configured? – Correct.

What is EPPF's preferred delivery methodology? Agile, Hybrid agile, other? - Hybrid

"What are the required Support Hours? What will be EPPF's support model? - Standard business support 24x7

Can you please share required SLA/OLA?" – This will be shared with successful bidder.