

- **User access for external people** - is there a requirement for any of the system functionality to be accessed by external parties (people not on EPPF network) like customers? – **No**
- **Extent of systems integration to CRM platform.** It was mentioned in the briefing session that data migration will be required from Case Management and Marketing system. Beyond these two systems, are there other systems that will need to be integrated to CRM? If yes, can you please share some details around the technology stack for these systems? – **Yes, Risk Management system, Pension Administration system, Data Platform (PowerBI, Insights, Warehouse/Lake) , SMS gateway, Email service, Contact Centre System, Document Management System.**
- We note from the RFP the need to push data into the System of Insight - **what technology is your System(s) of Insight? – Microsoft Azure Tech Stack.**
- For the requirement: Sales and Marketing Module - *Events management and booking capabilities*, please may you elaborate on this requirement. – **Apart from the standard CRM Sales & Marketing, the CRM solution should have event marketing & management capabilities. NB: If the solution does not come standard with that, the vendor is allowed to propose a solution that can be plugged into the CRM system.**
  - Will this be for users from EPPF to be able to book appointments and log events on the CRM solution or
  - Is the requirements for customers of EPPF to have a portal to be able to make and confirm bookings with EPPF? – **The booking capabilities is for both internal & external users. e.g. Members/Customers should be able to book appointments with the CRM team, also Internal CRM team should be able to plan & promote events for Members/Customers/stakeholders, manage attendee engagements etc**
- For the requirement: Sales and Marketing Module – *Third Party Social Media Integration*:
  - Which social media platforms do you work with? – **Youtube, LinkedIn, Facebook**
  - Should the CRM platform create the campaign or is it more the performance metrics of the campaign from the social media platform that CRM should display? – **The CRM system should have capability to create & manage campaigns, leads, etc.**
- For the requirement: Customer Service: *Real-time decision support and adoptive business rule engine*, may you please elaborate on this requirement? – **The solution should provide a configurable Workflow, rules management e.g. defining SLA business rules etc without/minimal code implementation**
- May you provide an overview of the current solutions/applications within the EPPF landscape that will remain and will store data that will need to be integrated to the CRM platform. - **Risk Management system, Pension Administration system, Data Platform (PowerBI, Insights, Warehouse/Lake) , SMS gateway, Email service, Contact Centre System, Document Management System, Service Desk**