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# **Request for Proposal:**

## **For The Provision of the Customer Relationship Management (CRM) System**

Administrative Briefing Session

17 February 2022

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# Agenda

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- Welcome and Opening: Khanyiso
- About the Fund: Ole (Olebogeng)
- Scope of work: Ole (Olebogeng)
- Timelines: Khanyiso
- RFP Response & Fee Structure : Khanyiso
- Disqualifying criteria: Khanyiso
- Questions:Team

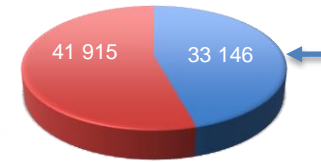
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# About the Fund

- Self Administered Defined Benefit Pension Fund
- Largest Financial Sector Conduct Authority (FSCA) regulated retirement fund in South Africa
- Active members (June 2020) →
- Pensioners membership (June 2020) →
- Head Office Bryanston, satellite offices Emalahleni, Durban, Bellville and East London with around 120 permanent employees;
- Core business activities are Pension Fund Administration (RFO) and Investment Management Unit (IMU) with support functions including Finance, HR, IT, Governance and Assurance department
- Current approximately R144 .5 Billion assets under management (June 2020)



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# Scope of Work

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The Retirement Fund Operations team requires a Customer Relationship Management System that will seek to create efficiency in business with regards to customer engagement. The appointed service provider will be expected to continuously offer new, innovative, and cost-effective updates to process that aligned to Best Practice, in line with the changing world of work and taking advantage of digital transformation.

## SOFTWARE LICENSING(UNCONDITIONAL)

- All Modules as per functional requirements.

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# Scope of Work

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## IMPLEMENTATION FEE (ONCE OFF)

- Configuration/Installation of software
- Consulting and application development for tailoring and integrating systems
- Data analyses and conversion
- Project management services

## RESOURCE DEPLOYMENT(Onsite/Remote)

- Proposed team - 1 Project manager + 2 implementation resources (with dual knowledge of capabilities required) to work closely with the Fund's internal resource.
- Build and execute test strategy

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# Scope of Work

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## TRAINING

- Training for 10 key stakeholders

## SUPPORT AND MAINTENANCE

- Software maintenance and upgrades
- Day to Day support
- 36 months

## ESTIMATED CONTRACT PERIOD – 36 Months

There is currently no CRM solution in the Fund.

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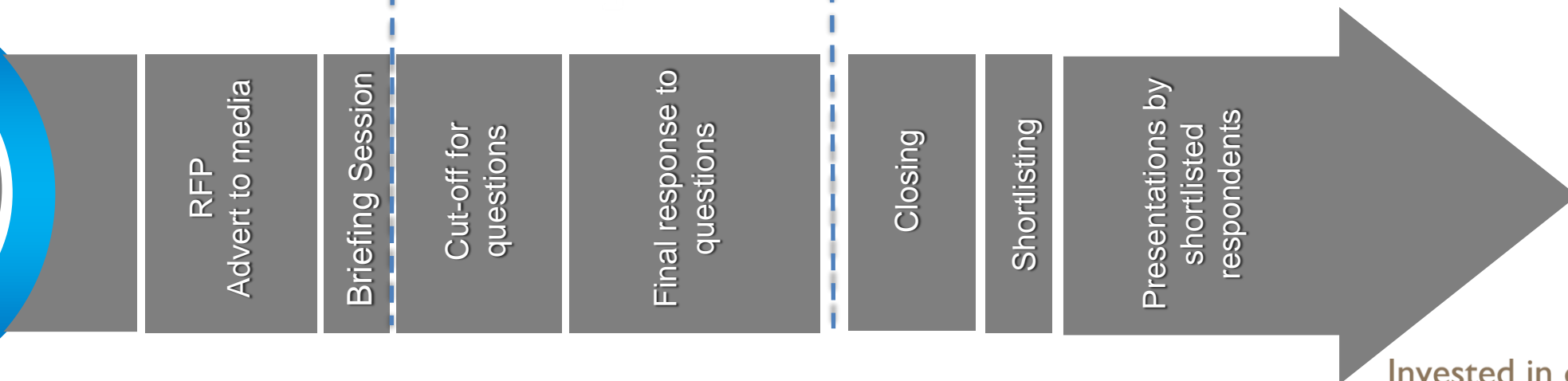




# RFP Timelines



February 2022		February 2022		March 2022		
09 – 13 Feb 2022		17 Feb 2022	21 Feb 2022	23 Feb 2022	04 March 2022	23 – 25 March 2022
						28 – 31 March 2022



## Estimated contract start date – May 2022

The Fund will only be able to provide formal communication to bidders, once the overall evaluation and approval process has been concluded, this includes actual approval by the Procurement Committee and/ or any other relevant Board Committee/s.

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## Please note



All queries must be submitted **in writing only** and responses to queries or points of clarity will be on the Fund's website. Electronic email address for queries is **[ProcurementOffice@eppf.co.za](mailto:ProcurementOffice@eppf.co.za)**

Proposals received by any other means other than communicated will not be considered and will be rendered invalid;

Respondents are to make sure that their RFP response are electronically submitted to the above-mentioned email address **by 12h00 South African time on the 04 March 2022.**



The Fund reserves the right to withdraw, at any stage of this process, amend or cancel this RFP, reject or not accept any or all proposals

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# RFP Response

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- Proposals must be electronically generated and signed by the individual(s) legally authorised to bind the respondent (**Signed RFP document, acceptance of terms and conditions**), Contract terms and conditions to be negotiated with a successful Bidder;
- Respondents must, on the official letterhead of the company submitting the response, declare that:
  - the information provided in all documentation is true and correct; and
  - the signatory of the tender document is duly authorised to do so.
- The electronic copies of the RFP proposal and/or examples of work must be provided in Adobe Reader Portable Document Format (PDF), free of any viruses or malicious ware;

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# RFP Response (Conti.)

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The structure of the RFP response to include;

- Executive Summary of the Proposal
- Company Background and Track Record
- Proposed team members for the project and their credentials
- Proposed Services
- Key Deliverables
- Pricing Schedule
- References (three references relating to services required to be included)
- B-BBEE certificate
- Supporting Documents

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# Supporting Documents

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## Mandatory Supporting documents;

- A detailed statement of the company's B-BBEE credentials as required in the above, supported by a rating certificate from a SANAS accredited rating institution or a B-BBEE affidavit.
- Recent audited Financial Statement of the specific entity that will be submitting the proposal, and if successful, contracting with the Fund. Group or any other entity's Annual Financial Statements will not be accepted. Respondents who are not required by law to have audited financial statements must include a letter signed by an authorised official confirming that the respondent is not required by law to have audited financial statements and accordingly, is unable to provide same. Failure to submit a complete set of financial statements i.e. all pages or redaction/blanking out or omission of any portion of the financial statements will render the submission incomplete and will lead to disqualification at the evaluation stage.

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## Supporting Documents (Cont.)

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- Respondents must complete the EPPF POPIA Self Compliance Forms (EPPF Operator Privacy Due Diligence Form and Operator Privacy Compliance Self-Assessment Form)

In the case of a Joint Venture the above-mentioned documentation, with the exception of the B-BBEE credentials, need only be supplied for the primary entity.

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# Supporting Documents (Cont.)

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## Administrative Supporting Documents;

- Declaration (Formal letter) as per (6.1) under Further required submissions
- Certified copies of CIPC company registration documentation. In the case of respondents who are not companies as envisaged in the Companies Act of 2008, equivalent founding documents must be submitted;
- A valid Tax Clearance Certificate and/or PIN indicating good standing with the South African Revenue Services (SARS);

**NB! Please make use of the RFP checklist to ensure that all required documents are submitted.**

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# Fee Structure

The fee and costs schedule must be complete and must indicate the following scenarios/options;

No.	Item description	Estimated No of Licences/Users	Rate Per Licence/ hour (Inc VAT)	Total Estimated cost (Inc VAT)
1	<b>Software Licensing – Annual (Unconditional)</b> <ul style="list-style-type: none"><li>○ All Modules as per functional requirements</li></ul>	30 users	Suppliers to provide	Suppliers to provide
2	<b>Implementation fee (Once-Off)</b> <ul style="list-style-type: none"><li>○ Configuration of software</li><li>○ Consulting and application development for tailoring and integrating systems</li><li>○ Data analyses and conversion</li><li>○ Project management services</li></ul>	N/A	Suppliers to provide	Suppliers to provide

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# Fee Structure

The fee and costs schedule must be complete and must indicate the following scenarios/options;

No.	Item description	Estimated No of Licence/Users	Rate Per User / hour (Inc VAT)	Total Estimated cost (Inc VAT)
3	<b>Deployment of Resources on the project (onsite/remote)</b> <ul style="list-style-type: none"><li>Proposed team - 1 Project manager + 1 implementation resources (with dual knowledge of capabilities required) to work closely with the Fund's internal resource.</li></ul>	Supplier to advise	Suppliers to provide	Suppliers to provide
4	<b>Training (Once-off)</b>	10 Key Stakeholders	Suppliers to provide	Suppliers to provide

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# Fee Structure

The fee and costs schedule must be complete and must indicate the following scenarios/options;

No.	Item description	Estimated No of Licence/Users	Rate Per User / hour (Inc VAT)	Total Estimated cost (Inc VAT)
5	Ongoing cost for post implementation Support and Maintenance	36 months	Suppliers to provide	Suppliers to provide
6	Data on Maintenance Agreements		Suppliers to provide	Suppliers to provide
7	Other costs (if applicable)			
Total Price Incl. VAT (ZAR)				

Note: All pricing must be inclusive of Value Added Tax (VAT)

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# Evaluation Criteria

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Emphasis will be on;

- Functional Ability (55%)
- B-BBEE certificate (20%)
- Price (20%)
- POPIA Compliance (5%)

Shortlisted respondents will be provided with detailed information for the second stage of the evaluation process.

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## Disqualifying criteria

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Failure to meet the below;

- Failure to submit before the specified date and time
- Failure to comply with paragraph 4.6.1 to 4.6.4 of the RFP.
- A minimum of five (5) years demonstrated experience of successful Customer Relationship Management (CRM) System
- Failure to submit requested mandatory supporting documentation in 6.6.
- Acceptance of the RFP terms and conditions – contract terms and condition shall be discussed and negotiated with the successful Bidder.

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# Questions?

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Electronic mail address for queries is [ProcurementOffice@eppf.co.za](mailto:ProcurementOffice@eppf.co.za)

Deadline for submission of queries is on **21 February 2022** at 16h00 SA Time.

Responses to queries or points of clarity will be updated on the EPPF Website by **24 February 2022** at 16h00 SA Time.

**Closing date for RFP submissions will be on 04 March 2022 at 12h00 SA Time.**

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# Thank You

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