

**RFQ 02-2022
TERMS OF REFERENCE
REQUEST FOR QUOTATION (RFQ)**

**CRM PROJECT: TECHNICAL SUPPORT FOR MICROSOFT DYNAMICS 365
IMPLEMENTATION**

Released:
11 June 2021

Submissions close:
22 June 2021

Responses to:
Ashleigh October, Office and Travel Co-ordinator
Telephone: 021 487 8600
Email: Ashleigh@wesgro.co.za

Email submission address:
Attention: Ashleigh October
E-mail: Ashleigh@wesgro.co.za

an inspiring place to do business



1. INTRODUCTION

Wesgro is the official tourism, trade and investment promotion agency for Cape Town and the Western Cape, established under provincial law and governed by a Board of Directors. We are the first point of contact for foreign importers, local exporters and investors wishing to take advantage of the unlimited opportunities of the growing Cape. Our role is to be the champion of economic opportunities in our city and province, and to facilitate conversion of these opportunities to help drive growth and create jobs.

1.1 PURPOSE OF THE CONTRACT

Information and Communication Technology (ICT) plays a vital role in supporting Wesgro's mission. The Corporate Services IT Unit is responsible for the maintenance, evolution and support of the Agency's CT systems, whilst planning to meet the agency's increasing needs for high performing ICT services. ICT services and support need to meet the requirements of all business units within Wesgro while ensuring that necessary governance mechanisms are in place.

The agency consists of approximately 110 staff members operating from Cape Town and Knysna, with 115 Microsoft 365 licenses. Staff are currently working remotely as Wesgro is operating a hybrid business model. The environment consists primarily of Microsoft Windows laptops and servers and some Apple iPads and laptops. It is important that the movement of staff and access to the CRM be incorporated into the approach to the project.

MS Dynamics 365 has been implemented and the system is live. Features include:

- Accounts and contacts (activities, names and notes);
- Account Segmentation (Groups, segmentations and sub segments);
- Dashboards active;
- Marketing and campaigns;
- All Wesgro staff have access;
- Training has taken place; and
- Additional integrations has been completed: Snapaddy (Business card scanner).

1.2 GOAL OF CONTRACT

The goal of the MS Dynamics 365 CRM project is to improve efficiencies and overall performance within the agency. Currently the objective is to provide **support** to our IT unit and the CRM Project Team related to technical aspects of the system to maintain implementation within the agency..



2. DELIVERABLES OF THE MS DYNAMICS 365 CRM PROJECT

The following deliverables have been identified for the project in terms of the requirements of the support:

- 1) Provide support to Wesgro's IT unit and the CRM Project team for a one-year duration and a maximum of 10 hours per month. This would constitute 120 hours in total.
- 2) Support required relates to the following technical areas:
 - a) User support;
 - b) System support;
 - c) Licensing support (no licenses will be purchased by the appointed service provider for Wesgro); and
 - d) Changes and updates to the system.

Wesgro will be billed on the utilisation of hours on a monthly basis. Therefore, it is important for the bidder to note that this is not a retainer contract.

3. SUBMISSION REQUIREMENTS

3.1 PROCESS AND DOCUMENTARY REQUIREMENTS

Wesgro may only pay service providers that are actively registered on the Central Supplier Database (CSD). Service providers should confirm with the CSD that their status is active and not suspended. The payments cannot be made to the service provider should their account be inactive or status suspended.

To ensure compliance the following must be submitted:

- A valid declaration of interest form (WCBD4);
- Bank detail form not older than three (3) months;
- Valid tax clearance certificate;
- Valid BEE Certificate;
- Proof of registration on the Central Supplier Database (CSD); and
- Proof of registration on the Western Cape Supplier Evidence Bank (WCSEB) — not compulsory.

3.2 COST BREAKDOWNS

Please be mindful that this is not a tender process because funds are limited and the services required does not require a tender process.

All prices in the quotation to include VAT.

Please specify any optional costs for Wesgro's consideration separately in the proposal.

END OF RFQ