

## **Section VII. Technical Specifications**

### **MANDATE**

The Center for International Trade Expositions and Missions (CITEM), created under the E.O. 989 series of 1984, is the export promotion arm of the Philippine Department of Trade and Industry (DTI).

CITEM is committed to developing, nurturing, and promoting globally-competitive small and medium enterprises (SMEs), exporters, and manufacturers in the food and sustainability solutions sector by implementing an integrated approach to export marketing in partnership with other government and private entities. With such commitment, the agency organizes its signature events, Manila FAME and IFEX Philippines NXT FOOD Asia to better service its stakeholders.

Manila FAME supports local small- and medium-scale enterprises and artisan communities by working with local designers to create new product collections and providing a professionally managed platform to present export products to the global market.

IFEX Philippines NXT FOOD Asia is CITEM's banner food event for Asian and Philippine food champions to showcase a wide and diversified array of food and ingredients uniquely Asian and a one-stop business to business (B2B) platform for leading buyers and top grocers around the world aiming to optimize their sourcing experience. In 2019, CITEM earned a total of Php32.499 million from Manila FAME (April and October shows) and a total of Php23.296M for participation fees alone; these numbers highlight the importance of the two banner events as big contributors to the agency's earning sources.

### **GLOBAL SITUATIONER**

The expos and trade show industry continues to perform strongly in 2018, with 99% of exhibitors finding unique value on attending trade shows compared to opportunities being offered by other marketing platforms.

For exhibitors, a majority find trade shows and expos beneficial to promote their companies and brands, obtain new buyers and prospects, and connect with existing clients.

For buyers, trade shows and expos provide opportunities on new products and services. Decision makers, particularly, are able to find at least one supplier on the show they attended, filling a gap in the supply chain cycle that is important in any business sector.

Above reasons focus on relationship management and engagement.

Admittedly, there are also disadvantages in a physical setting of trade shows and expos: 1) the cost of buyer attendance (45%), 2) limitation on providing the right spot on conference floor (45%), 3) low value in business leads (36%); 4) wrong speaking slots (36%); and 5) company booths being dominated by bigger players.

### **LOCAL SITUATIONER**

Fluctuating Buyer Attendance For the last three years, fluctuations in buyer attendance are noted in both Manila FAME and IFEX Philippines NXT FOOD Asia as collated from Corporate Planning Division:

From 2017-2019, there were a total of 5,968 buyers who attended Manila FAME. On a yearly basis comparison, this resulted in a 36.75% buyer attendance increase in 2018 versus 2017. However, buyer attendance only registered a .13% growth in 2019 compared to 2018.

For IFEX, buyer attendance reached a total of 5,303 from 201-2019. Buyer attendance fell by 12.42% in 2018 from 2017, while it dropped further to 24.71% in 2019 versus 2018.

With the fluctuations in the number of trade buyers in both banner shows, it was incumbent for CITEM to explore avenues to convince more buyers to attend its signature avenues. Thus, the development of the Digital Community Trade Platform (DTCP) for Manila FAME is timely and paramount as it helps exporters continue their conversation with buyers beyond a specific number of days usual in a physical trade fair.

#### The Digital Community Trade Platform

CITEM was looking forward to augment its physical trade shows with the anticipated launch of Manila FAME DTCP in October 2020. This platform will be the initial of several DTCPs that CITEM would be adopting for its other projects (e.g. IFEX Philippines NXT FOOD Asia, etc.)

The Manila FAME DTCP will serve as an online dossier of design and lifestyle pieces where the holistic experience for buyers and visitors of Manila FAME emanates. It aims to form an online community where exhibitors, trade buyers, and Manila FAME champions can come together to transact, promote their business, share product reviews, gain business and design insights, communicate with each other, form business alliances, and be inspired with a wealth of information on Filipino craftsmanship—all under one hub.

The digital marketplace shall support multiple users in a collaborative content-generation environment, with content support for text, embedded graphics, photos, videos, and other multimedia files. It is more than a website—the new [www.manilafame.com](http://www.manilafame.com) is a portfolio of Philippine design trends and a platform to facilitate digital trade.

#### COVID-19 Pandemic

The uncertainty and unrest caused by the SARS-COV2 responsible for the Corona-virus or COVID-19 pandemic accelerated the need for CITEM to embrace digitization in its activities. The pandemic imperiled the staging of physical trade shows and expos, causing potential losses to micro, small and medium enterprises (MSMEs) – who are CITEMs core stakeholders.

Good foresight though has put CITEM a step ahead in mitigating huge economic costs in the absence of a physical event and the safety risks of face-to-face interaction brought on by the COVID-19 situation. The agency's Manila FAME DTCP is the first step to filling the void left by the cancellation of physical trade shows and expos. Come October 2020, CITEM will launch a virtual trade fair to be participated in by top exporters in the home, design, and lifestyle sectors. Buyer campaign is also ongoing to ensure Filipino exhibitors will continue to sell their products to the world.

## Importance of Relationship Management and Engagement

The 24/7, 360 days activities anticipated in a DTCP are expected to change how Manila FAME Project Team interact with both buyers and exhibitors and vice versa. Such continuing conversation requires the deployment of an enterprise level Customer Relations Management (CRM) system that facilitate the journey of important stakeholders: the exhibitors, the Manila FAME Exhibitor Team, the buyers, and the Manila FAME Buyer Team.

### A. Improve Stakeholder Journey

From the point of view of internal teams of CITEM, it is a must to understand the exhibitor journey and buyer journey in a platform such as the Manila FAME DTCP.

Tracking and measuring the activities of exhibitors and buyers through a CRM would prove beneficial to Project Teams as behaviors of both groups provide a goldmine on how:

1. To calibrate its marketing initiatives to reach targeted buyers who have a need for products being featured at Manila FAME. This would decrease turnaround time in engaging buyers;
2. To improve customer relations with both exhibitor and buyers, thereby, increasing retention rates for both stakeholders;
3. To enhance efficiency level of internal CITEM employees who have roles and/or assigned tasks;
4. To re-configure frequently asked questions on a project for stakeholders;
5. To determine future builds within the CRM to better serve stakeholders; and
6. To generate real-time reports which will serve as customer feedback and help and the Agency achieve Item #1.

### B. Cost Implication

The traditional process of running a complete cycle of engaging an exhibitor and a buyer is very costly for a government agency like CITEM.

Constant engagement between internal and outside stakeholders would require a considerable amount of man hours, which would translate into millions of pesos. For instance, producing a simple material like an e-card and then deploying it to various stakeholders included in a CITEM database would require the following process and actors/players/employees:

1. Operations Group (OG) – Fills up Service Request Form (SRF) for e-card
2. Division Clerk OG – Forwards the SRF
3. Division Clerk Web Marketing division – Receives the SRF and forwards to Division Chief
4. Division Chief (OIC, WMD + Communications Management Division) – Evaluates and forwards the SRF to Writer
5. CMD Writer – Conceptualized content, updates the SRF, sends back to DC OIC, WMD and CMD
6. DC OIC, WMD and CMD sends to DC WMD
7. DC WMD sends to Division Clerk Visual Design Division (VDD)
8. DC VDD received the SRF and sends to Point Person VDD
9. Point Person VDD assigns to VDD staff
10. VDD staff creates corresponding image or artworks

11. VDD staff sends to VDD Clerk
12. VDD Clerk sends to Division Clerk WMD
13. Division Clerk WMD sends to DC OIC, WMD and CMD
14. DC OIC, WMD and CMD assigns to WMD Developer for testing
15. WMD Developer tests e-card to internal stakeholders
16. OG as requesting party gives approval
17. WMD Division Clerk forwards to System, Maintenance and Management Division (SMDD) for send out

The process above is very labor intensive and is costing CITEM in thousands of pesos for one simple e-card. Since there are two signature events and other projects, it is not surprising for Project Officers to request a minimum of eight (8) e-cards for one project.

In a given month, the man hours being spent on several e-cards for one project, for example, would run in hundreds of thousands of pesos to a million. Compared to the Php300,000.00 per month that a powerful CRM can offer. This would mean more efficient use of the time of the staff involved in the actual process, which would eventually translate into millions of savings for CITEM.

The enumerated 17 steps described above can be reduced through the CRM.

How?

Within the CRM, roles are assigned and/or delegated. The 17 steps can be cut down into:

1. Operations Group is assigned a role as an Account Manager, who will make a request for an e-card using a queuing system under the Administrator or DTCP Project Owner (the WMD and/or the Consultant under the Office of the Executive Director)
2. Administrator or DTCP Project Owner will then move the queue of the task to the Graphic Artist (VDD) and Writer to come up with the image and text for an ecard;
3. The Administrator or DTCP Project Owner approves the material and moves the queue to the Web Developer of WMD for coding adjustments (if necessary) and testing;
4. Once the test is approved by the Administrator or DTCP Project Owner, Web Developer requests SMDD staff for actual blast to database recipients;
5. The Administrator or DTCP Project Owner or SMDD staff generates the report for sharing to the requested Operation Group parties.

Overall, the procurement of an agile, easy-to use CRM that can integrate the current databases future proofs the agency from any internal or external factors that may greatly impact its operations and stakeholders at the same time provides huge savings in millions of pesos and provides opportunities for the agency to generate new income after deployment (since the features available such as the marketing automation system can be offered outside of CITEM).

## **OBJECTIVES**

To hire a Philippine registered company that would provide a premium-based Customer Relations Management system with the following qualifications:

1. An expert in providing a premium cloud-based solution on customer relationship management service and complementary enterprise application suites, with focused points on: marketing automation, customer service, application development, and analytics. To submit: Company profile and services; and Organizational chart and outline of responsibilities including hierarchy and authorization (sign off authority points);

2. Has more than 100 successful CRM project implementations. To submit: List of projects implemented with any of the following: User Acceptance Testing, Go Live Certificate, Signed Order Form; Outline of client experience of not more than 3 similar projects with clear scope, timeline and results. Must be relevant.; Summary of understanding of engagement, this may be presented in an executive summary; and Internal methodology and processes including conflict resolution methodology.;

3. Has 50 or more than employees, 50% of which should be certified consultants in CRM. To submit: Company organization chart with names of CRM certified employees; Company organization chart with names of CRM certified employees; Structure of project; Certification of 1 copy each per CRM consultant from Huma Resources Division for CRM consultant employees; Project Manager: Examples of at least 1 Curriculum Vitae of relevant resource who would be available for this engagement; Knowledge Transfer (post 'go-live'): Full knowledge transfer plan, including full training plan for different levels of users. Clearly identify what knowledge/training documentation will be provided; Project plan with mobilization: Complete project plan with description of phases, deliverables as per Scope of Work, and milestones. Location on how work is to be facilitated must be clearly outlined.; Clear resource plan required with confirmation of availability of relevant resources in appropriate methodology, including processes and sign off of authority level/roles.; Technical Support: Description of channels available to client for reporting issues and inquiries. Provide proposed service level agreements for answering inquiries and resolution of issues.; Disaster Mitigation: Description of plans and validation procedure.

4. Is a highly certified company by an international organization for 4 years or more, with marketing cloud certified consultants and with at least 5 successful/significant project implementation in the Philippines in marketing cloud. To submit: Partnership certificate or documentation; Reseller certificate.

5. Must have a compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive. To submit: Presentation Materials before Technical Working Group.

### **Notes for Preparing the Technical Specifications**

A set of precise and clear specifications is a prerequisite for Bidders to respond realistically and competitively to the requirements of the Procuring Entity without qualifying their bids. In the context of Competitive Bidding, the specifications (e.g. production/delivery schedule, manpower requirements, and after-sales service/parts) must be prepared to permit the widest possible competition and, at the same time, present a clear statement of the required standards of workmanship, materials, and performance of the goods and services to be procured.. Only if this is done will the objectives of transparency, equity, efficiency, fairness and economy in procurement be realized, responsiveness of bids be ensured, and the subsequent task of bid evaluation and post-qualification facilitated. The specifications should require that all items, materials and accessories to be included or incorporated in the goods be new, unused, and of the most recent or current models, and that they include or incorporate all recent improvements in design and materials unless otherwise provided in the Contract.

Samples of specifications from previous similar procurements are useful in this respect. The use of metric units is encouraged. Depending on the complexity of the goods and the repetitiveness of the type of procurement, it may be advantageous to standardize the General Technical Specifications and incorporate them in a separate subsection. The General Technical Specifications should cover all classes of workmanship, materials, and equipment commonly involved in manufacturing similar goods. Deletions or addenda should then adapt the General Technical Specifications to the particular procurement.

Care must be taken in drafting specifications to ensure that they are not restrictive. In the specification of standards for equipment, materials, and workmanship, recognized Philippine and international standards should be used as much as possible. Where other particular standards are used, whether national standards or other standards, the specifications should state that equipment, materials, and workmanship that meet other authoritative standards, and which ensure at least a substantially equal quality than the standards mentioned, will also be acceptable. The following clause may be inserted in the Special Conditions of Contract or the Technical Specifications.

**Sample Clause: Equivalency of Standards and Codes**

Wherever reference is made in the Technical Specifications to specific standards and codes to be met by the goods and materials to be furnished or tested, the provisions of the latest edition or revision of the relevant standards and codes shall apply, unless otherwise expressly stated in the Contract. Where such standards and codes are national or relate to a particular country or region, other authoritative standards that ensure substantial equivalence to the standards and codes specified will be acceptable.

Reference to brand name and catalogue number should be avoided as far as possible; where unavoidable they should always be followed by the words "or at least equivalent." References to brand names cannot be used when the Funding Source is the GOP.

Where appropriate, drawings, including site plans as required, may be furnished by the Procuring Entity with the Bidding Documents. Similarly, the Supplier may be requested to provide drawings or samples either with its Bid or for prior review by the Procuring Entity during contract execution.

Bidders are also required, as part of the technical specifications, to complete their statement of compliance demonstrating how the items comply with the specification.

## Technical Specifications

Bidders must state here either “Comply” or “Not Comply” against each of the individual parameters of each Specification stating the corresponding performance parameter of the equipment offered. Statements of “Comply” or “Not Comply” must be supported by evidence in a Bidders Bid and cross-referenced to that evidence. Evidence shall be in the form of manufacturer’s un-amended sales literature, unconditional statements of specification and compliance issued by the manufacturer, samples, independent test data etc., as appropriate. A statement that is not supported by evidence or is subsequently found to be contradicted by the evidence presented will render the Bid under evaluation liable for rejection. A statement either in the Bidders statement of compliance or the supporting evidence that is found to be false either during Bid evaluation, post-qualification or the execution of the Contract may be regarded as fraudulent and render the Bidder or supplier liable for prosecution subject to the provisions of **ITB Clause Error! Reference source not found.** and/or **GCC Clause Error! Reference source not found.**

**Statement of Compliance** Bidders are required, as part of the technical specifications, to complete their statement of compliance demonstrating how the items comply with the specification.

Item	Specification / Scope of Work	Statement of Compliance				
<p><b>A.</b></p> <p><b>One Year Subscription: Marketing Automation</b></p>	<p><b>1. Deliver Marketing Automation System</b></p> <p>This powerful Marketing Automation System will help the agency develop and manage its marketing relationships and campaigns with various stakeholders.</p> <p>This platform will further equip CITEM with valuable data across numerous sources to have a holistic understanding of what its stakeholders want. Through this CRM, CITEM can listen and deduct its stakeholders’ intent; allowing the project officers and internal stakeholders as well to craft a customized and improve buyer engagement eventually.</p> <p><b>Expected Output: Marketing Automation System Is Implemented</b></p> <table border="1" data-bbox="407 1562 1019 1881"> <tr> <td data-bbox="407 1562 565 1881">Marketing Automation Implementation</td> <td data-bbox="565 1562 667 1881">Marketing Automation Setup</td> <td data-bbox="667 1562 813 1881">           Set Up Business Unit Administration Settings           <ul style="list-style-type: none"> <li>• Account Settings</li> <li>• Headers &amp; Footers</li> <li>• Users (almost 50)</li> <li>• Security Settings</li> </ul> </td> <td data-bbox="813 1562 1019 1881">Users are created with designated roles and access</td> </tr> </table>	Marketing Automation Implementation	Marketing Automation Setup	Set Up Business Unit Administration Settings <ul style="list-style-type: none"> <li>• Account Settings</li> <li>• Headers &amp; Footers</li> <li>• Users (almost 50)</li> <li>• Security Settings</li> </ul>	Users are created with designated roles and access	
Marketing Automation Implementation	Marketing Automation Setup	Set Up Business Unit Administration Settings <ul style="list-style-type: none"> <li>• Account Settings</li> <li>• Headers &amp; Footers</li> <li>• Users (almost 50)</li> <li>• Security Settings</li> </ul>	Users are created with designated roles and access			

	Marketing Automation Implementation	Email Marketing System Setup	Create Data Extensions/ Lists	Storage availability for Sendable and Non-Sendable data		
	Marketing Automation Implementation	Audience Builder Setup	Setup Contact Builder <ul style="list-style-type: none"> <li>• Create Attribute Groups</li> <li>• Create Populations</li> </ul>	Single view of all data with relationship can be accessed		
	Marketing Automation Implementation	Email Marketing System Setup	Setup FTP Account <ul style="list-style-type: none"> <li>• Create credentials</li> <li>• Validate FTP connectivity</li> </ul>	Data storage for file transfer is active		
	Marketing Automation Implementation	Email Marketing System Setup	Upload Content files for Email Creation <ul style="list-style-type: none"> <li>• Image</li> <li>• Video</li> <li>• Audio</li> <li>• Code</li> <li>• Text</li> </ul>	Storage of all assets for email content		
	CRM Implementation	Audience Builder Setup	Create Import Definitions	Automation of import of data to lists & data extensions		
	CRM Implementation	Email Marketing System Setup	Validate Sends Tracking	Verify customer activity for email interaction		
	CRM Implementation	Email Marketing System Setup	Create Sender Profiles	Additional FROM label for email sending		
	CRM Implementation	Email Marketing System Setup	Setup URL expiration for emails	URL on emails expires after the specified URL expiration		
	Marketing Automation Implementation	Email Marketing System Setup	Create Emails	Reusable email and email templates for sending-out to customers		
	Marketing Automation Implementation	Email Marketing System Setup	Create Email Sends Definitions			
	Marketing Automation Implementation	Approvals	Set up a process for reviewing and approving various objects	Emails prior send out requires to undergo an approval process.		



	Marketing Automation Implementation	Email Marketing System Setup	Create Measures	Additional filter for sent/undelivered email criteria	
	Marketing Automation Implementation	Email Marketing System Setup	Create Data Filters	Data filter for sent/undelivered emails	
	Marketing Automation Implementation	User(s) Journey Setup	Create 4 Interactions in Journey Builder	4 interactions for personalized customer experience	
	Marketing Automation Implementation	Automation Setup	Create Automations <ul style="list-style-type: none"> <li>• SQL Query</li> <li>• Filters</li> <li>• Import File</li> <li>• File Transfer</li> <li>• Data Extract</li> </ul>	Automation for data management	
	Analytics Builder	Reports	Automation for reports	CITEM will automatically have access to all standard reports available in Marketing Automation	
	Knowledge Transfer	Marketing Automation	Explanation of how to configure Marketing Automation (at least 25 training hours)	CITEM will have knowledge of how to configure the Marketing Automation, and what campaigns are best suited to each type of use case.	

**B.**

**One-Year Subscription: Social Media Marketing Tool**

**2. Deliver Social Media Marketing Tool**

This tool must have the capability to listen from any digital platform sources (up to 18 CITEM digital social channels) to obtain what the fans and the concerned industry are saying about CITEM and its brands.

This tool must allow CITEM and its brands to respond to posts on its social channels, manage respective communities, and deliver customer support in the process.

This tool must allow CITEM and its brands to create and publish content across networks and accounts.

This tool must allow officers responsible for CITEM and its brands to extract insightful reports at the same time see live displays of activities on social platforms. Such monitoring capability can be done using one interface.

Expected Output: Implementation of Social Media Marketing Tool

Social Media Marketing Tool Implementation	Social Accounts Setup	Configure all Social Media Accounts	Social Accounts are available for use for different workspaces
Social Media Marketing Tool Implementation	Engagement Macros Setup	Configure macros for easy tagging and assignment of posts for each user	Users will be able to assign posts to other users
Social Media Marketing Tool Implementation	User Setup	Creation and setup of required Users:	Administrator and users will have to the Social Media Marketing System access based on given role.
		<ul style="list-style-type: none"> <li>Administrator</li> <li>Super Users</li> </ul>	
		<ul style="list-style-type: none"> <li>Full Users</li> <li>Basic Users</li> </ul>	
Social Media Marketing Tool	Topic Profile Setup	Setup of Topic Profiles for broad listening: <ul style="list-style-type: none"> <li>Up to four (4) profiles</li> </ul>	Broad listening profiles will be capturing branded

	Implementation		<ul style="list-style-type: none"> <li>Up to six (6) Keyword Groups per profile</li> </ul>	conversation outside of official social channels.
		Data Validation	Validation of data capture by topic profiles.	Ensure that broad listening profiles are capturing desired data.
	Social Media Marketing Tool Implementation	Source Group Setup	Addition of multiple websites (blogs, forum, mainstream news) for:	Monitoring of specific pages, groups, people in social media is captured
			<ul style="list-style-type: none"> <li>Monitoring keywords;</li> </ul>	
			<ul style="list-style-type: none"> <li>Monitoring entire page; and</li> </ul>	
			<ul style="list-style-type: none"> <li>Excluding pages</li> <li>From selected websites</li> </ul>	
	Social Media Marketing Tool Implementation	Sentiment Model Setup	Model Management for:	Keywords added will have different sentiment scores
			<ul style="list-style-type: none"> <li>Adjustment of incoming posts that uses a specific language</li> </ul>	
Social Media Marketing Tool Implementation	Organization Settings	Standardized settings for all users	All users will have the same basic organization configurations	
Social Media Marketing Tool Implementation	Workspace Setup	Set up of required Workspaces	Workspaces will be available to segment users, profiles, and social accounts by different criteria.	
Social Media Marketing Tool Implementation		Up to four (4) workspaces		
Social Media Marketing Tool Implementation	User Workspace Settings	Addition and setup of required Users (unlimited):	User will have full/limited access within a workspace based on their roles	
		<ul style="list-style-type: none"> <li>Admin</li> <li>Contributor</li> </ul>		
		<ul style="list-style-type: none"> <li>Limited Member</li> </ul>		

	Social Media Marketing Tool Implementation	Social Workspace Settings	Linking of integrate Social Accounts to specific Workspaces	Social accounts are assigned to workspaces	
	Social Media Marketing Tool Implementation	Topic Profile Workspace Settings	Linking of created Topic Profiles to specific Workspaces	Topic profiles are assigned to workspaces	
	Social Media Marketing Tool Implementation	Engagement Macros Workspace Settings	Linking of created Engagement Macros to specific Workspaces	Engagement Macros are assigned to workspaces	
	Social Media Marketing Tool Implementation	Template Workspace Settings	Creation of templates for use of	New users within a workspace will automatically have a tab or users are able to use templates for easy creation of tabs within Engage component	
different users within a					
Workspace					
	Social Media Marketing Tool Implementation	Engage Workspace Settings	Creation of tabs and columns for:	Users can monitor different social media accounts based on keywords given; also, able to reply to posts if Social Media account for post is integrated	
<ul style="list-style-type: none"> <li>Monitoring of personal Social Accounts</li> </ul>					
<ul style="list-style-type: none"> <li>Monitoring of brand-related web posts outside of your own social media accounts</li> </ul>					
<ul style="list-style-type: none"> <li>Monitoring of Competitor's posts and pages</li> </ul>					
	Social Media Marketing Tool Implementation	Analyze Workspace Settings	Dashboard creation for:	Summary of reports for Social Media Engagement and Keywords provided	
Social Media					
<ul style="list-style-type: none"> <li>Accounts</li> <li>Topic Profiles</li> </ul>					

Social Media Marketing Tool Implementation	Reports Workspace Settings	Automation for reports generated	Reports are generated via CSV and/or PDF file on a specified time automatically
Knowledge Transfer	Social Media Marketing System	Explanation Social Media Marketing System Setup and data configuration: <ul style="list-style-type: none"> <li>• WWorkspaces</li> <li>• Social Accounts</li> <li>• TTopic Profiles</li> </ul>	CITEM will have knowledge of how Social Media Marketing System is configured, and how changes can be made.

**C. Implementation Schedule for Marketing Automation System and Social Media Marketing Tool**

\*For the Marketing Automation System and Social Media Marketing Tool, CITEM will provide Winning Bidder with an application programming interface to allow the CRM to capture data from different digital platforms the agency is using now.

**Implementation Schedule for Marketing Automation System and Social Media Marketing Tool:**

Project Stages	Month 1				Month 2				Month 3			
	w1	w2	w3	w4	w5	w6	w7	w8	w9	w10	w11	w12
Stage 0: Planning												
Stage 1: Requirements Gathering												
Stage 2: Design Phase												
Stage 3: Build Phase												
Stage 4: UAT												
Stage 5: Training												
Stage 6: Go Live												

**Month 1 Requirements**

Gathering The objective of this project stage is to get the more detailed information about the relevant process, setup, and requirements of the users in relation to the project scope.

**Month 2**

Solution Design The objective of this project stage is to design the process flow described in the Project Scope section based on the agreed BRD prepared in Requirements Gathering stage and map them into the overall solution.

	<p>Configuration and Development The objective of this project stage is to build each of the components described in the Project Scope section based on the design document prepared in Solution Design stage.</p> <p><b>Month 3</b></p> <p>System Integration Testing and Users Acceptance Testing</p> <p>The objective of this project stage is to conduct System Integration Testing and Users Acceptance Testing for all the developed components that will be rolled out at the end of this project.</p> <p>Training/Knowledge Transfer</p> <p>The objective of this project stage is to provide end-user training of the CRM application. A training session (minimum of 24 dedicated training hours) will help CITEM users learn everything about the CRM.</p> <p>Go-Live Deployment</p> <p>The objective of this project stage is to finalize the Project and transition to operation mode.</p> <p><b>Month 4 to Month 12</b></p> <p>Project Stage Post Implementation</p> <p>Winning Bidder will provide off-site support, fixing all system errors within thirty (30) days upon completion of Go-Live stage to assist CITEM. It is envisioned that the Winning Bidder will dedicate at least 400 support hours during a 12-month period to CITEM.</p>	
<p><b>D. Budget.</b></p>	<p>Total budget for the contract is not to exceed Php14,000,000.00, inclusive of taxes.</p> <p>Source: Digital Budget for 2020</p>	
<p><b>E. Contract Duration</b></p>	<p>The contract shall take effect upon the Winning Bidder's actual receipt of the Notice of Award (NOA) and shall remain in force and in effect for a period of twelve (12) months.</p>	
<p><b>F. Project Milestones</b></p>	<p>1. Turnover of Licenses through Signed Agreement</p> <p>Winning Bidder to issue invoice for licenses and</p>	

	<p>50% of implementation service fee upon receipt of CITEM signed contract or Purchase Order. Payment should be made within 15 days period.</p> <p>2. Implementation Services + Business Requirement Document Sign Off</p> <p>Winning Bidder to issue Invoice for the 20% Implementation cost upon receipt of signed Business Requirement Document. Payment should be made within 15 days period.</p> <p>3. Implementation Services + User Acceptance Testing</p> <p>Winning Bidder to issue Invoice for the 20% Implementation cost upon receipt of signed User Acceptance Testing (UAT) Document. Payment should be made within 15 days period.</p> <p>4. System Go-Live Sign Off</p> <p>Winning Bidder to issue Invoice for the application management service fee and 10% Implementation cost upon receipt of signed Go-Live Sign-Off Document. Payment should be made within 15 days period.</p>	
<b>G. Non-Disclosure and Confidential Information</b>	The Winning Bidder shall treat as confidential all information provided by CITEM related to the agreement that will arise from this Terms of Reference, including but not limited to its business and operations. All confidential information provided by CITEM shall be used by the Winning Bidder solely for the purposes of rendering services pursuant to the agreement signed by both parties.	

### QUALITATIVE DOCUMENTS FOR EVALUATION

Document Required	Statement of Compliance
<p>I. Submit proof(s) that bidder is a Philippine registered company that is an expert in providing a premium cloud-based solution on customer relationship management service and complementary enterprise application suites, with focused points on: marketing automation, customer service, application development, and analytics.</p> <p>Document Required:</p> <p>a. Company profile and services</p> <p>b. Organizational chart and outline of responsibilities including hierarchy and authorization (sign off authority points)</p> <p><b>35 POINTS</b></p>	

<p>II. Submit proof(s) that bidder has more than 100 successful CRM project implementations.</p> <p>Documents Required:</p> <p>a. List of projects implemented with any of the following: User Acceptance Testing, Go Live Certificate, Signed Order Form</p> <p>b. Outline of client experience of not more than 3 similar projects with clear scope, timeline and results. Must be relevant.</p> <p>c. Summary of understanding of engagement, this may be presented in an executive summary; and Internal methodology and processes including conflict resolution methodology.</p> <p><b>25 POINTS</b></p>	
<p>III. Submit proof(s) that bidder has 50 or more than employees, 50% of which should be certified consultants in CRM.</p> <p>Documents Required:</p> <p>a. Company organization chart with names of CRM certified employees.</p> <p>b. Company organization chart with names of CRM certified employees.</p> <p>c. Structure of project.</p> <p>d. Certification of 1 copy each per CRM consultant from Human Resources Division for CRM consultant employees.</p> <p>e. Project Manager: Examples of at least 1 Curriculum Vitae of relevant resource who would be available for this engagement.</p> <p>f. Knowledge Transfer (post 'go-live'): Full knowledge transfer plan, including full training plan for different levels of users. Clearly identify what knowledge/training documentation will be provided.</p> <p>g. Project plan with mobilization: Complete project plan with description of phases, deliverables as per Scope of Work, and milestones. Location on how work is to be facilitated must be clearly outlined.</p> <p>h. Clear resource plan required with confirmation of availability of relevant resources in appropriate methodology, including processes and sign off of authority level/roles.</p> <p>i. Technical Support: Description of channels available to client for reporting issues and inquiries. Provide proposed service level agreements for answering inquiries and resolution of issues.</p> <p>j. Disaster Mitigation: Description of plans and validation procedure.</p> <p><b>15 POINTS</b></p>	



<p>IV. Submit proof(s) that bidder is a highly certified company by an international organization for 4 years or more, with marketing cloud certified consultants and with at least 5 successful/significant project implementation in the Philippines in marketing cloud.</p> <p>Document Required: a. Partnership certificate or documentation; Reseller certificate.</p> <p><b>15 POINTS</b></p>	
<p>V. Prepare a compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive</p> <p>Document required: a. Actual Presentation Materials before Technical Working Group</p> <p><b>10 POINTS</b></p>	

**Note: The Candidate must get a passing point of at least 95 points.**

I hereby certify that the statement of compliance to the foregoing Technical Specifications and Qualitative Documents are true and correct, otherwise, if found to be false either during bid evaluation or post-qualification, the same shall result to automatic disqualification of our bid.

**CERTIFIED CORRECT:**

\_\_\_\_\_  
Name & Signature of Authorized Representative

\_\_\_\_\_  
Position

\_\_\_\_\_

<b>QUALITATIVE EVALUATION</b>		
<b>CRITERIA</b>	<b>DOCUMENTARY REQUIREMENT</b>	<b>NUMERICAL RATING</b>
<p><b>35 POINTS</b> Submit proof(s) that bidder is a Philippine registered company that is an expert in providing a premium cloud-based solution on customer relationship management service and complementary enterprise application suites, with focused points on: marketing automation, customer service, application development, and analytics.</p>	<p>Present/Submit government registrations and other business certifications stating to such criteria.</p> <p>Document Required:</p> <p>a. Company profile and services</p> <p>b. Organizational chart and outline of responsibilities including hierarchy and authorization (sign off authority points)</p>	<p><b>35 points</b> With 7 years or more expertise in providing premium cloud-based solution on customer relationship management service and complementary enterprise application suites</p>
		<p><b>30 points</b> With 5-6 years expertise in providing premium cloud-based solution on customer relationship management service and complementary enterprise application suites</p>
		<p><b>25 points</b> With 4 years and below expertise in providing premium cloud-based solution on customer relationship management service and complementary enterprise application suites</p>
<p><b>25 POINTS</b> Must have more than 100 successful CRM project implementations.</p>	<p>Submit proof(s) bidder has more than 100 successful CRM project implementations. May be a list of clients with projects implemented, with start date and end date</p> <p>Documents Required:</p> <p>a. List of projects implemented with any of the following: User Acceptance Testing, Go Live Certificate, Signed Order Form</p> <p>b. Outline of client experience of not more than 3 similar projects with clear scope, timeline and results. Must be relevant.</p> <p>c. Summary of understanding of engagement, this may be</p>	<p><b>25 points</b> With 100 and more successful CRM project implementations</p> <p><b>20 points</b> With 99 - 75 successful CRM project implementations</p> <p><b>15 Points</b> With 74 and below successful CRM project implementations</p>

	<p>presented in an executive summary; and Internal methodology and processes including conflict resolution methodology.</p>	
<p><b>15 POINTS</b> Must have 50 or more than employees, 50% of which should be certified consultants in CRM.</p>	<p>Submit proof(s) bidder has 50 or more than employees, 50% of which CRM consultants. May include a list of names of employees and CRM-related certifications</p> <p>Documents Required:</p> <ul style="list-style-type: none"> <li>a. Company organization chart with names of CRM certified employees.</li> <li>b. Company organization chart with names of CRM certified employees.</li> <li>c. Structure of project.</li> <li>d. Certification of 1 copy each per CRM consultant from Huma Resources Division for CRM consultant employees.</li> <li>e. Project Manager: Examples of at least 1 Curriculum Vitae of relevant resource who would be available for this engagement.</li> <li>f. Knowledge Transfer (post 'go-live'): Full knowledge transfer plan, including full training plan for different levels of users. Clearly identify what knowledge/training documentation will be provided.</li> <li>g. Project plan with mobilization: Complete project plan with description of phases, deliverables as per Scope of Work, and</li> </ul>	<p><b>15 Points</b> With 50 and more employees, 50% of which are certified CRM consultants</p> <p><b>10 Points</b> With 49 and less employees, 50% of which are certified CRM</p>

	<p>milestones. Location on how work is to be facilitated must be clearly outlined.</p> <p>h. Clear resource plan required with confirmation of availability of relevant resources in appropriate methodology, including processes and sign off of authority level/roles.</p> <p>i. Technical Support: Description of channels available to client for reporting issues and inquiries. Provide proposed service level agreements for answering inquiries and resolution of issues.</p> <p>j. Disaster Mitigation: Description of plans and validation procedure.</p>	
<p><b>15 POINTS</b> Must be a highly certified company by an international organization for 4 years or more, with marketing cloud certified consultants and with at least 5 successful/significant project implementation in the Philippines in marketing cloud</p>	<p>Submit proof(s) bidder is highly certified company by an international organization for 4 years or more, with identified list of clients and of projects implemented in marketing cloud in the Philippines</p> <p>Document Required:</p> <p>a. Partnership certificate or documentation; Reseller certificate.</p>	<p><b>15 Points</b> With certification from an international organization for 4 years and above</p> <p><b>10 Points</b> With certification from an international organization for 3 years and</p>
<p><b>10 POINTS</b> Must have a compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive</p>	<p>Presents a list of ICT tools which the bidder <b>will use</b> during the project implementation (with proposed file-sharing platforms and storage specifications with at least <b>3-months</b>, including subscription to any <b>unlimited time online conferencing tool</b> that can host at least 50</p>	<p><b>10 Points</b> With compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive</p> <p><b>0 Point</b> Without a compelling and clear presentation before CITEM officers about its</p>

	participants and with recording capacity)  Document required: a. Actual Presentation Materials before Technical Working Group	products and services, with the presence of at least 1 Asean.
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*Note: The Candidate must get a passing point of at least 95 points. Evaluation shall be made by an in-house panel from CITEM.*

**Annex A**  
**Schedule of Implementation Schedule for Marketing Automation System and Social Media Marketing Tool**

Month 1	Requirements Gathering	Metro Manila	Pasay (at CITEM Office or remotely thru coordination of key divisions)
Month 2	Solution Design + Configuration and Development	Metro Manila	Pasay (at CITEM Office or remotely thru coordination of key divisions)
Month 3	System Integration Testing and Users Acceptance Testing + Training/Knowledge Transfer + Go-Live Deployment	Metro Manila	Pasay (at CITEM Office or remotely thru coordination of key divisions)
Month 4 to Month 12	Project Stage Post Implementation	Metro Manila	Pasay (at CITEM Office or remotely thru coordination of key divisions)