

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.

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.¹

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.²

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:

Manila FAME October

Indicators	2017	2018	2019	2020**
No. of Participants	435	364	385	532
No. of Trade Inquiries*	7,784	6,847	7,302	14,117 (in terms of website visits)
Trade Buyers	1,597	2,184	2,187	14,117 (in terms of website visits)
Potential Export Orders (in Million USD)	6.86	4.81	4.25	No data available
Local Sales (Domestic + Retail in Million Php)	62.00	73.46	30	No data available

*All registered attendees were considered to have made an inquiry

**A digital edition due to the COVID-19 global pandemic.

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.

IFEX PH: NXTFOOD ASIA

Indicators	2017	2018	2019
No. of Participants	797	451	627
No. of Trade Inquiries	10,912	7,060	9,771
Trade Buyers	2,092	1,832	1,379
Potential Export Orders (in Million USD)	184.69	86.67	119.14
Local Sales (Domestic + Retail in Million Php)	424.68	59.78	456

*With ASEAN participation

**IFEX SEAFOOD

***All registered attendees were considered to have made an inquiry

****IFEX PH on 2020 was cancelled

For IFEX, buyer attendance reached a total of 5,303 from 2017-2019. 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.

Tapping the potential of online platforms

On 2020, CITEM augmented its physical trade shows with launch of Manila FAME Digital Community Platform, FAME Plus, in October 2020. FAME+ serves as a promotion and lead generation platform for the home, fashion and lifestyle (HFL) industry, which offers the following features:

- Database of brands and companies with their own digital storefronts to display their products
- Content Amelioration Program for the onboarded MSMEs
- Product Development Program
- Online magazine that tells the stories of the brands and products. These stories are then distributed via email and social media
- Exhibitor dashboard to manage leads
- Buyer dashboard enables them to collate info from the site
- Analytics
- CRM to aid marketing

A total of 14,117 users visited www.fameplus.com since its launched in 13 October 2020 until 31 December 2020, resulting in 22,565 sessions or user interactions and 113,289 page views. Also as of December, FAME+ already onboarded 184 exhibitors, promoting 479 new designs developed to 532 trade buyers, and has attracted 14,117 visitors.

COVID-19 Pandemic and Digitalization as the Way Forward

According to the Organization for Economic Co-operation and Development (OECD), **in the current the time of COVID-19 global pandemic, online platforms have opened new sales and sourcing channels for SMEs** and facilitated their access to multiple types of digital networks which might be key for the survival and expansion of both existing and nascent SMEs – by providing e-commerce sales, teleworking capabilities and more.

However, SMEs face challenges and risks in operating on online platforms. The lack of digital skills and the need to adapt business models can be important barriers. Fee structures of the platforms and the sharing of sensitive business data with implicit acceptance of matching algorithms on which SMEs have no influence or even information also present challenges. There are also risks related to digital security, competition distortion and possible lock-in effects.

Governments have a strong role to play in enabling greater uptake (and in turn fostering resilient growth). Initiatives are needed to boost SME engagement in e-commerce, greater online presence, and communication platforms that can facilitate remote working. Some governments are also promoting programmes in co-operation with large online platforms.

CITEM is 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. FAME Plus DTCP is the first step to filling the void left by the cancellation of physical trade shows and

expos. CITEM is also expanding the digitalization of its promotion efforts for various industries---for the creative industry (<https://www.createphilippines.com/>), food industry (<https://www.ifexconnect.com/> and [foodphilippines.com](https://www.foodphilippines.com/)), and sustainability industry (<https://sustainabilityexpo.ph/>).

Importance of Relationship Management and Engagement

The 24/7, 360 days activities anticipated in a DTCP are expected to change how CITEM Project Teams 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. Evident to this growing conversation with stakeholders is the high number of CITEM postings on social media platforms. Based on Salesforce Social Studio, CITEM has posted a total of 6,404 content on its social media channels across the various brands that it handles since January to August 2021. The Salesforce Marketing Cloud, on the other hand, has allowed CITEM to deploy customized communication materials appealing to the needs of target stakeholders. The system has also provided the agency insightful data on how to engage internal and external stakeholders.

Since the CITEM has already trained its workforce in 2020 to manage social marketing tools and conduct management support services, CITEM is eyeing to procure a CRM provider to continue its access to the Marketing Automation System and Social Media Marketing Tools. Below is the services checklist of what CITEM has procured in 2020 and will be procuring for 2021:

Features	2020	2021
1. One-Year Subscription		
Marketing Automation System		
Messaging capability of more than 20 million/year	✓	✓
Can accommodate more than 90,000 contacts	✓	✓
More than 40 marketing automation users (Roles as administrators, viewer, channel manager, security administrator, content editor/publisher)	✓	✓
1,000 social media users (Roles as administrators, Super User, Full User, Basic User)	✓	✓
2. Social Media Marketing Tool		
Can accommodate 18 social media accounts	✓	✓
Can accommodate 100 Topic Profiles within a single Tenant	✓	✓
Can accommodate 250,000 social media mentions monthly	✓	✓
3. Implementation Services	✓	
Marketing cloud implementation services for both Email Marketing 5,000,000.00 System + Social Media Marketing Tool	✓	N/A
Dedicated minimum 25 training hours to facilitate knowledge transfer to users	✓	N/A

4. Application Management Support Services		
At least 400 support hours for 12 months after warranty period	☑	(in effect, valid until June 17, 2022)
Email & Phone support; On-Call Onsite	☑	
Must be powered by Artificial Intelligence + Machine Learning	☑	
System readiness to integrate future modules or core systems of CITEM	☑	
Responsive trade promotions tool to assist MSMEs stakeholders	☑	
Costing	P14M	P8.3M

Sustained CRM will ensure enhanced 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;
6. To generate real-time reports which will serve as customer feedback and help and the Agency achieve Item #1; and
7. To cascade customer feedback (i.e. buyers and other external stakeholders) to exhibitors to help the latter in their business decision making.

CRM is Cost Effective and Streamlines Service Delivery

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 Customer Relations Management system with the following qualifications:

1. The Philippine registered company must be an expert in providing a 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. Must have successful CRM project implementations.

To submit: List of projects implemented with any of the following: Signed Order Form, User Acceptance Testing, Go Live Certificate; 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. Must have CRM certified consultants

To submit: 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. 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

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.

The nature of the company that will be contracted by CITEM should be an information technology (IT) and business development company that offers client-based solutions services on CRM, Data Management, Ecommerce, Application management Services, eProcurement and other Industry Solutions.

SCOPE OF WORK

Cloud-Based Customer Relations Management System
<i>Features</i>
One-Year Subscription
Marketing Automation System
Messaging capability of more than 20 million/year
Can accommodate more than 90,000 contacts
More than 40 marketing automation users (Roles as administrators, viewer, channelmanager, security administrator, content editor/publisher)
1,000 social media users (Roles as administrators, Super User, Full User, Basic User)
Social Media Marketing Tool
Can accommodate 18 social media accounts
Can accommodate 100 Topic Profiles within a single Tenant
Can accommodate 250,000 social media mentions monthly

Note: The services under scope of work shall include after-sales services where CITEM will be able to consult with the supplier in case of any technical difficulty related to the services delivered.

The company that would provide a cloud-based CRM system shall be in charge of the following undertakings:

[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 Bidder’s 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 applicable laws and issuances.]

Item	Specification	Statement of Compliance																				
<p>A. Deliverables</p> <p>One Year Subscription: Marketing Automation</p>	<p>Create Marketing Automation System</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 messaging and improve buyer engagement eventually.</p> <table border="1" data-bbox="407 1171 1243 1852"> <tr> <td data-bbox="407 1171 615 1398">Marketing Automation Feature</td> <td data-bbox="615 1171 813 1398">Marketing Automation Creation</td> <td data-bbox="813 1171 1040 1398"> Set Up Business Unit Administration Settings <ul style="list-style-type: none"> • Account Settings • Headers & Footers • Users (almost 50) • Security Settings </td> <td data-bbox="1040 1171 1243 1398">Users are created with designated roles and access</td> </tr> <tr> <td data-bbox="407 1398 615 1465">Marketing Automation Feature</td> <td data-bbox="615 1398 813 1465">Email Marketing System Creation</td> <td data-bbox="813 1398 1040 1465">Create Data Extensions/Lists</td> <td data-bbox="1040 1398 1243 1465">Storage availability for Sendable and Non- Sendable data</td> </tr> <tr> <td data-bbox="407 1465 615 1556">Marketing Automation Feature</td> <td data-bbox="615 1465 813 1556">Audience Builder Creation</td> <td data-bbox="813 1465 1040 1556"> Setup Contact Builder Create Attribute Groups Create Populations </td> <td data-bbox="1040 1465 1243 1556">Single view of all data with relationship can be accessed</td> </tr> <tr> <td data-bbox="407 1556 615 1692">Marketing Automation Feature</td> <td data-bbox="615 1556 813 1692">Email Marketing System Creation</td> <td data-bbox="813 1556 1040 1692"> Setup FTP Account <ul style="list-style-type: none"> • Create credentials • Validate FTP connectivity </td> <td data-bbox="1040 1556 1243 1692">Data storage for file transfer is active</td> </tr> <tr> <td data-bbox="407 1692 615 1852">Marketing Automation Feature</td> <td data-bbox="615 1692 813 1852">Email Marketing System Creation</td> <td data-bbox="813 1692 1040 1852"> Upload Content files for Email Creation <ul style="list-style-type: none"> • Image • Video • Audio • Code • Text </td> <td data-bbox="1040 1692 1243 1852">Storage of all assets for email content</td> </tr> </table>	Marketing Automation Feature	Marketing Automation Creation	Set Up Business Unit Administration Settings <ul style="list-style-type: none"> • Account Settings • Headers & Footers • Users (almost 50) • Security Settings 	Users are created with designated roles and access	Marketing Automation Feature	Email Marketing System Creation	Create Data Extensions/Lists	Storage availability for Sendable and Non- Sendable data	Marketing Automation Feature	Audience Builder Creation	Setup Contact Builder Create Attribute Groups Create Populations	Single view of all data with relationship can be accessed	Marketing Automation Feature	Email Marketing System Creation	Setup FTP Account <ul style="list-style-type: none"> • Create credentials • Validate FTP connectivity 	Data storage for file transfer is active	Marketing Automation Feature	Email Marketing System Creation	Upload Content files for Email Creation <ul style="list-style-type: none"> • Image • Video • Audio • Code • Text 	Storage of all assets for email content	
Marketing Automation Feature	Marketing Automation Creation	Set Up Business Unit Administration Settings <ul style="list-style-type: none"> • Account Settings • Headers & Footers • Users (almost 50) • Security Settings 	Users are created with designated roles and access																			
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	CRM Feature	Audience Builder Creation	Create Import Definitions	Automation of import of data to lists & data extensions
	CRM Feature	Email Marketing System Creation	Validate Sends Tracking	Verify customer activity for email interaction
	CRM Feature	Email Marketing System Creation	Create Sender Profiles	Additional FROM label for email sending
	CRM Feature	Email Marketing System Creation	Setup URL expiration for emails	URL on emails expires after the specified URL expiration
	Marketing Automation Feature	Email Marketing System Creation	Create Emails	Reusable email and email templates for sending-out to customers
		Email Marketing System Creation	Create Email Sends Definitions	
	Marketing Automation Feature	Approvals	Set up a process for reviewing and approving various objects	Emails prior send out requires to undergo an approval process.
	Marketing Automation Setup	Email Marketing System Creation	Create Measures	Additional filter for sent/undelivered email criteria
	Marketing Automation Feature	Email Marketing System Creation	Create Data Filters	Data filter for sent/undelivered emails
	Marketing Automation Feature	User(s) Journey Creation	Create 4 Interactions in Journey Builder	4 interactions for personalized customer experience
	Marketing Automation Feature	Automation Creation	Create Automations	Automation for data management
			• SQL Query	
			• Filters	
			• Import File	
			• File Transfer	
			• Data Extract	
	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	<p><i>Creation of Social Media Marketing Tool</i></p> <p>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.</p> <p>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</p>			

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.

Social Media Marketing Tool Feature	Create Social Accounts	Configure all Social Media Accounts	Social Accounts are available for use for different workspaces	
	Create Engagement Macros	Configure macros for easy tagging and assignment of posts for each user	Users will be able to assign posts to other users	
	User Setup	Creation and setup of required Users:	<ul style="list-style-type: none"> • Administrator • Super Users • Full Users • Basic Users 	Administrator and users will have to the Social Media Marketing System access based on given role.
	Create Topic Profile	Setup of Topic Profiles for broad listening:	<ul style="list-style-type: none"> • Up to four (4) profiles • Up to six (6) Keyword Groups per profile 	Broad listening profiles will be capturing branded conversation outside of official social channels.
	Data Validation	Validation of data capture by topic profiles.		Ensure that broad listening profiles are capturing desired data.
	Source Group Creation	Addition of multiple websites (blogs, forums, mainstream news) for:	<ul style="list-style-type: none"> • Monitoring keywords; • Monitoring entire page; and • Excluding pages from selected websites 	Monitoring of specific pages, groups, people in social media is captured
Sentiment Model Creation	Model Management for:		Keywords added will have different sentiment scores	
	Adjustment of incoming posts that uses aspecific language			
Organization Settings	Standardized settings for all users		All users will have the same basic organization configurations	
Workspace Creation	Set up of required Workspaces		Workspaces will be available to segment users, profiles, and social accounts by different criteria.	
	Up to four (4) workspaces			
User Workspace Settings	Addition and setup of required Users (unlimited):	<ul style="list-style-type: none"> • Admin • Contributor • Limited Member 	User will have full/limited access within a workspace based on their roles	
Social Workspace Settings	Linking of integrated Social Accounts to specific Workspaces		Social accounts are assigned to workspaces	

		Topic Profile Workspace Settings	Linking of created Topic Profiles to specific Workspaces	Topic profiles are assigned to workspaces		
		Engagement Macros Workspace Settings	Linking of created Engagement Macros to specific Workspaces	Engagement Macros are assigned to workspaces		
		Template Workspace Settings	Creation of templates for use of different users within a Workspace	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		
		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"> Monitoring of personal Social Accounts 			
			<ul style="list-style-type: none"> Monitoring of brand- related web posts outside of your own social media accounts Monitoring of Competitor's posts and pages 			
			Monitoring of industry-related posts			
		Analyze Workspace Settings	Dashboard creation for:	Summary of reports for Social Media Engagement and Keywords provided		
			<ul style="list-style-type: none"> Social Media Accounts 			
			<ul style="list-style-type: none"> Topic Profiles 			
		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 of Social Media Marketing System Setup and data configuration:	CITEM will have knowledge of how Social Media Marketing System is configured, and how changes can be made.		
					<ul style="list-style-type: none"> Workspaces 	
					<ul style="list-style-type: none"> Social Accounts Topic Profiles 	
	<p>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.</p>					
VI. PROJECT DURATION	<p>The contract shall take effect upon the Winning Bidder's actual receipt of the Notice to Proceed (NTP) and shall remain in force and in effect for a period of twelve (12) months, including after-sales services once the license has been turned over to CITEM Management.</p>					

VII. OWNERSHIP	All creative concepts and original materials formulated and designed in conjunction with this project shall be exclusively owned by CITEM, and with full exercise of discretion and rights on future use.	
VIII. PAYMENT TERMS	<p>FULL PAYMENT</p> <p>The supplier will be fully paid once they turnover of Licenses through Signed Agreement Winning Bidder to issue invoice for Social Media Marketing and Marketing Automation System licenses.</p> <p>Total Amount: 100%</p>	
IX. BUDGET	<p>Eight Million Three Hundred Thousand Pesos (PHP8,300,000.00) inclusive of all applicable taxes and other fees is allotted to the project under the Customer Relations Management (CRM) budget.</p>	
X. NON-DISCLOSURE AND CONFIDENTIAL INFORMATION	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 Evaluation Documents

Document Required	Statement of Compliance
<p>Submit proof(s) that bidder is a Philippine registered company that is an expert in providing a 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>The documentary requirement proof must contain the following:</p> <ul style="list-style-type: none"> • Company profile and services • Organizational chart and outline of responsibilities including hierarchy and authorization (sign off authority points) 	
<p>Submit proof(s) that bidder has more than 100 successful CRM project implementations.</p> <ul style="list-style-type: none"> • List of projects implemented with <i>any</i> of the following: User Acceptance Testing, GoLive 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. 	
<p>Submit proof(s) that bidder has 35 or more CRM-certified consultants. Proof must contain the following:</p> <ul style="list-style-type: none"> • Company organization chart with names of CRM certified employees. • Structure of project. • Certification of 1 copy each per CRM consultant from Human 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. 	

<ul style="list-style-type: none"> • 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. 	
<p>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. Proof must include:</p> <ul style="list-style-type: none"> • Partnership certificate or documentation; • Reseller certificate. 	
<p>Prepare a compelling and clear presentation before CITEM officers about its products and services, with the presence of at least 1 Asean regional executive. The bidder must submit the following:</p> <ul style="list-style-type: none"> • Presentation Materials before Technical Working Group 	

I hereby certify that the statement of compliance to the foregoing Technical Specifications 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

Qualitative Evaluation and Technical Bid

Passing Score: 95

To fully satisfy and not compromise the quality of the requirements, a qualitative evaluation is necessary in the selection process. Bidder shall be required to submit the following requirements which will be used to evaluate his/her qualifications. If the bidder passes the qualitative evaluation, the contract will be awarded to the lowest calculated and responsive bidder.

PARTICULARS	POINTS
1. The Philippine registered company must be an expert in providing a 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. (35 Points)	
With 7 years or more expertise in providing premium cloud-based solution on customer relationship management service and complementary enterprise application suites	35 points
With 5-6 years expertise in providing premium cloud-based solution on customer relationship management service and complementary enterprise application suites	30 points
With 4 years and below expertise in providing premium cloud- based solution on customer relationship management service and complementary enterprise application suites	25 points
2. Must have more than 100 successful CRM project implementations. (25 Points)	
With 100 and more successful CRM project implementations	25 points
With 75 – 99 successful CRM project implementations	20 points
With 74 and below successful CRM project implementations	15 points
3. Must have 35 or more CRM certified consultants (15 POINTS)	
With 35 and more CRM certified consultants	15 points
With 16-34 CRM certified consultants	10 points
With 1-15 CRM certified consultants	5 points
4. 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 (15 points)		
	With certification from an international organization for 4 years and above	15 points
	With certification from an international organization for 3 years and below	10 points
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 (10 points)		
	Clarity of Presentation Clarity of Presentation will be evaluated on how coherent and easy-to-digest the information will be present to the evaluator.	5 points
	Implementation of Services and Fit to CITEM needs Implementation of Services and Fit to CITEM needs will be evaluated based on how relevant the current services offered by the bidder to CITEM's needs.	5 points
<i>Note: The Candidate must get a passing point of at least 95 points. Evaluation shall be made by an in-house panel from CITEM. No pitching sessions will be held. The bidders will be evaluated solely based on their document submission.</i>		