

Call for proposals

Selection CRM-system

Introduction

BEUC's current contact database and event management tool are not fully meeting the organisation's needs. They do not conform with the best available technology and user-friendliness requirements.

BEUC needs a web-based contact database which is easy to use for administrative as well as policy staff.

We frequently organise many internal and external events/conferences. The event management tool must be highly adaptable to cater for these different types of events. (However, BEUC's events are rather simple in nature and their management requires basic RSVP functionalities as well as additional questions regarding accommodation, dietary needs etc.)

It should also be simple to use in order for non-administrative BEUC staff to use it independently from any IT support.

The new ecosystem should minimise as much as possible the number of import/exports of contact data.

A key requirement for our new database and event management tool is total compliance with the EU's data protection laws.

Project goal

The overall project goal is to implement a new CRM which can assist the organisation to manage its contacts, events and knowledge-sharing more efficiently.

The new CRM must allow BEUC to convey a professional image, be reliable, allow for easier use by all BEUC staff and ensure compliance with EU data protection laws.

Sub-goals

The new platform must at least meet the following sub-goals, although not all features are required from the beginning. Some of the outlined sub-goals below are optional, and the decision to incorporate them would depend on future discussions with the chosen provider.

- 1. Unsubscribing*

Unsubscribing must be as user-friendly as possible. Users should be able to indicate whether they want to be unsubscribed entirely or only receive information regarding certain topics / particular actions (events, new documents etc.). To achieve this, we would create a matrix of subscription possibilities.

- 2. Highly customizable search*

The CRM should allow for highly customizable search combinations. The tool, will be able to populate, save and reuse lists based on complex requests and on different criteria linked with Boolean operators (and, or, and not).

3. *Knowledge-sharing about contacts*

One of the features that a good CRM should offer is for BEUC staff to easily share knowledge linked to contacts managed on the platform. The CRM should allow BEUC to build value over time: BEUC should be able to develop knowledge on our contacts so that we can use that information to provide appropriate and timely information to our contacts.

4. *Reporting*

The new CRM should enable reporting on KPIs (number of meetings/events, effect of meetings, participants, etc.).

5. *Surveys (optional)*

An easy to launch and respond-to survey system should be available. It should allow for similar features similar to popular survey tools such as surveymonkey.

Technical Requirements

1. *Very user friendly*

The design of the platform has to be as user-friendly as possible, without being saturated with content, in a way in which navigation is intuitive for all its users.

- Event managers can manage events / activities through the platform so that, for instance, invitations for events can be sent on the basis of a contact's history with BEUC or shown interests.
- Newsletters can be written, designed and sent from the new tool. [Note: BEUC currently works with an external mailing tool and may decide to continue using that tool. In this case it would be required to establish a link (API) between the CRM and the database of the mailing tool.]

2. *Interoperable*

The platform should run on any type of web browser, installed on any type of operating system. The contact databases should allow for an easy integration with other tools such as mailing tools. The tool will be synchronised with the contacts from the HUB (BEUC extranet), and with users from our Active Directory.

- Related software systems can make use of data from the contact management tool or enrich the data in the contact management software, such as BEUC's extranet for members.
- The new tool should enable the regular syncing of data with available public data, such as the public list of Members of the European Parliament (via XML or RSS).

3. *Mobile-ready*

The platform should be responsive to changes in size, and ready to be read on any type of mobile platforms with a smartphone or a tablet.

4. *Autofill*

In order to simplify the process of updating and adding contacts, it would be helpful to work with autofill to ensure that organisation names, titles, country names etc. follow the same structure/spelling.

Generally, people should be allowed to improvise with spelling (e.g. a fixed list of countries).

5. *One stop shop for management of data*

Data should only need to be entered once, in either the new system or elsewhere i.e. the CRM would need to offer the possibility to connect to other databases via open API.

6. *Modular step by step roll-out (optional)*

As part of its customisation possibilities, the tool should allow a gradual / modular roll-out. Some features may be decided on at a later stage:

- BEUC's members can see and edit their own contact data already but when they do, that will be updated in the CRM system.
- All BEUC's contacts can add data to the contact record, such as registration for events, registration for newsletters or other sorts of communication.
- BEUC's fundraising activities can be run on the basis of BEUC's segmented contacts in the new CRM tool.
- Implementation of survey tool offering "skip logic".

Scope

The scope of the CRM-implementation project is as follows:

- Rolling out and setting up the new web platform.
- Create an import of all contact data (Admin User, spreadsheets, address books, extranet (TBD)) on the basis of scripts or manual import (considering the number of sources data may come from).
- Those will be structured in such a way that a flexible set of data is created that can be used to effectively communicate with any number of BEUC's contacts on any topic or activity, through the CRM platform or with related other apps (such as the extranet, financial system, etc.).
- On top of that, the ability to send bulk mail should be enabled, without having to manually export data.
- Staff can manage events / activities (such as workshops, conferences, etc.) through the tool.
- A number of fundraising activities (mail, online donation pages, meetings with big donors, etc.) can be managed through the platform.
- Extensive reporting, in different ways, visually (through diagrams) and with tables, can be run from the new tool.
- Training in the use of the platform.

Approach

The implementation of the selected CRM should happen according to a number of small steps. These steps are listed below but can be adapted in accordance with the selected contractor.

Step 1: Create a prototype of the new system supporting BEUC processes / procedures

Part of this step will be getting to know the structure and philosophy of the new system so that an initial setup for the different processes and procedures can be configured and tested.

Step 2: Managing contacts

This step will deal with the setup of all contacts in the new tool, segmented along interests, taking part in activities, donations or reactions to BEUC's correspondence.

This step is about configuring and testing the tool on the basis of all sorts of user stories on contact management and usually includes being able to select contacts for (bulk)mail.

Step 3: Event Management

Event management in this context means that the organisation of conferences/workshops/etc. can be supported by the new software. This means that an event can be described, published on the / a website and people can register to take part on the basis of an invitation through bulkmail, their logged-in status or because they visit the website as an anonymous user.

Any registration (which are usually free of charge) will appear in the new tool, including any needs people may have for flights or hotel reservations.

People's registration status can be changed, the overall result of the event can be managed by the organiser and evaluations can be sent beforehand or afterwards.

Step 4: Data migration

Data migration requires cleaning of the contacts.

Step 5: Going live with the new tool

To go live with the new tool, involves training users, communication about consequences for external people, setting up a production environment, running the final migration, stopping all links between the old system and activating links to the new one.

Tender procedure

Companies interested in participating in this call for proposals will be requested to provide an offer including the following elements:

- Presentation of the company and the services it offers.
- Recent client list & examples of recent work.
- Description of the CRM tool.
- Outline how the tool will meet the sub-goals and technical requirements.
- Price/quote (including set-up, yearly maintenance, integration new MEP database)

The deadline for submission of the offers is 11 May 2018. Presentations are not required but may be requested.

Selection criteria

Award of the contract will be done on the basis of the following criteria:

- Technical requirements (30%)
- Approach (30%)
- Price/quote (40%)

Contact

Offers should be submitted to the following email address: communications@beuc.eu

For more information please contact:

Johannes Kleis
(submission offer)

communications@beuc.eu

0032 (0)2 789 24 01

Philippe Dellis
(IT management)

pde@beuc.eu

0032 (0)2 743 15 90