World Vision International
Request for Information
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World Vision
Global Technology &
Digital Solutions

Request for Information

CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

I. INFORMATION ABOUT WORLD VISION INTERNATIONAL

What is World Vision International:
World Vision International is a non-profit, non-denominational Christian humanitarian aid and development organization that is dedicated to helping children and their communities worldwide reach their full potential by tackling the causes of poverty. With its origins in the 1950's, World Vision International is supported by more than 2.5 million supporters, 20,000 churches, hundreds of corporations, and governments in nearly 100 countries.

Who World Vision International serves:
World Vision International serves the most vulnerable children, families, and communities globally through emergency relief, education, health care, economic development, and advocacy. With approximately 35,000 World Vision International staff members worldwide, our work touches approximately 100 million people in nearly 100 countries, assisting people regardless of religion, ethnic background, or gender.

For further information, we encourage you to visit our website at www.wvi.org.

II. Goals and Objectives

World Vision International is conducting an Request for Information (RFI) for Customer Relationship Management (CRM) System, researching the market for a **CRM Technology Providers (OEM or Service Providers)** capable of overseeing the organization's sales, marketing and customer support functions in our fundraising support offices.

WVI is requesting responses from suppliers, which meet the requirements specified in this document. With the different technologies that exist in the field of customer relationship management systems today, World Vision International's aim is to research the market for fit for purpose solutions for their fundraising activities across the world.

The objective for this RFI is to gather information on the different platforms and supplier's capabilities and systems that would be appropriate for the needs of World Vision International including available features and associated costs.

This RFI is only for the purpose of collecting information that would help WVI understand the market landscape in terms of both supplier and CRM platforms. This exercise will result in a list of qualified suppliers to be invited to participate in a Global RFP. WVI reserves the right to change, supplement, or cancel this RFI at any time during the process. Submitting a reply to this RFI does not guarantee your company will be invited to the Global RFP.

If your company is interested in participating in this RFI, please contact Jonathan Jee (Global Procurement Advisor) at **jonathan_jee@wvi.org** to receive an invitation from our procurement system (Coupa) to access the sourcing event which will start on **November 1, 2021**.

III.   RFI Timetable

EVENT	DATE
RFI Advertise on Tender Sites	**10/18/2021**
RFI Commencement from Procurement System (Coupa)	**11/01/2021**
Supplier's submission deadline of questions Pertaining to RFI	**11/08/2021**
WVI's Response to Questions	**11/15/2021**
Supplier's Proposal Deadline	**11/22/2021**

IV. <u>WORLD VISION INTERNATIONAL'S CRM SYSTEMS BACKGROUND</u>

Currently there are several CRM applications used by WVI's offices. As a part of its ongoing digital transformation and fundraising business priorities, WVI is planning to migrate to modern, cloud-based, fit-for-purpose platform(s) for small and medium fundraising offices.

This fit-for-purpose CRM platform(s) for WV-affiliated offices should enable the offices to enhance their supporters' experience by using WVI and local marketing products, thereby facilitating offices reaching their fundraising targets.

The CRM platform should also support contextualised cause-based marketing offerings and corresponding donor journeys. It should encompass standardized business process and out of the box capabilities to bring in cost efficiency in ongoing support and maintenance.

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Below is a list of Offices that we are potentially implementing at new CRM platform

CRM (10) Offices Replacement
Brazil
Chile
Colombia
Costa Rica
Indonesia
Mexico
Mongolia
Philippines
South Africa
Thailand

Potential CRM (11) Offices
Armenia
Bosnia
Georgia
Romania
Albania
China
Dominican Republic
Ecuador
Kenya
Peru
Sri Lanka

V. CAPABILITIES & FUNCTIONALITY

CRM platform should have a set of core capabilities following the stated guiding principles:

I. The proposed CRM for this solution should be highly modularised, configurable from the functional perspective.
II. The proposed CRM solution should be fit for purpose to support the varying maturity level of the fundraising offices. Some of the offices would require basic functionalities, while some of them require medium and others require advanced functionalities
III. Costing is an important consideration since the office fundraising technology budgets are small and limited. So, modularising and offering the needed fit for purpose is an important requirement
IV. Minimum customization and maximum use of Out of the Box (OOTB) capabilities
V. The licensing requirement should be factored in when considering the modularised solution approach.
VI. The platform must meet modern information security standards and requirements (PCI DSS, etc.) and comply with different data protection and data sovereignty laws (GDPR, etc.)

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High Level Modular Functions expected from the CRM platform are listed below. This is not a complete list. A more detailed Scope of Work will be released during the Request for Proposal process:

Module	Functionalities
Sales Function	Customer Contract Management (Commitment management / Pledges) Account Management Partner Relationship Mgmt. (PRM) Opportunity & Pipeline Mgmt. Task / Activity Management Product Management Order Management Analytics on both donors/prospect and sales agents
Marketing Function	Multi-channel Marketing Campaign Management Lead Management Marketing ROI Analytics
Customer Support	Customer Support Portal Knowledge Base Call Center Features Support Analytics
Mobile & Social Media	Social Collaboration Features Social Network Integration Mobile User Support
Integrations & Automations	Data Integration, Import & Export capability via API Integration with external marketing tools, Payment Gateways, web front and mobile app Email, SMS and messenger Integration Process Automation
Reporting & Analytics	Reporting & Analytics Dashboard Forecasting
IT Requirements	Alerts & Notifications for the administrators Flexible User and Access Management Infosec and data protection compliance

VI. <u>REQUIREMENTS</u>

- **Supplier Qualification**

Suppliers needs to answer and provide all requested information outlined in the qualification questionnaire form in our procurement system, COUPA. (Sample below)

Supplier%20Qualifica
tion%20Questionnaire

- **Supplier Security Qualification Questionnaire**

Suppliers need to review and answer the security qualification questionnaire. At the Request for Purchase phase (RFP), you will be required to provide documented proof for your answers.

Supplier%20Security
%20Qualification%20(

- **Product / Technical Information Questionnaire**

Suppliers need to be prepared to answer all questions below in our procurement system webform questionnaire. ***Please note the procurement system will not allow you to save your work half way. You will have to fill it out completely before saving.**

1. What is your global footprint (List the countries you do business in)?
2. What is your hosting model?
3. What is your license model?
4. Is there a need for any additional software needed?
    a. If yes, please explain [Text Area]
5. Do you have any NGO's clients?
    a. If Yes, please specify number of deployments and countries
    b. Please submit two use cases including cost and duration of deployment, annual cost of support and amount of funds raised during first 5 years of the platform life in production.
6. What is your release policy?
7. What is your support model and support languages?
8. Please provide your business continuity policy and procedures.
9. Please provide your data protection and information security policies and procedures.
10. Do you have multiple footprints in at least 2 continents?
11. How many multi-country CRM Platform deployments have you had in the last 5 years?
12. Does your user interface support English, French, Spanish and Portuguese languages?
    a. If yes, please list out any other languages your platform supports.

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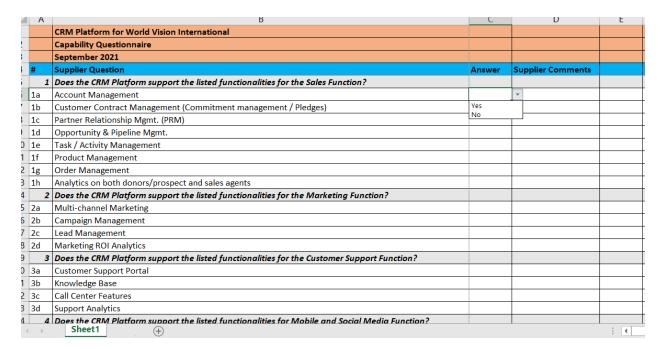Global Technology &
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13. (Optional) WVI encourages suppliers to provide access (a link) to a trial version of their CRM platform or relevant demo video covering its key capabilities.

- **Complete CRM System Capability Questionnaire**

Supplier needs to provide answers to all questions in the CRM System Capability Questionnaire and submit the file through our procurement system, COUPA. Please make sure to answer all questions.

Sample of the Questionnaire

	A	B	C	D	E
		CRM Platform for World Vision International			
		Capability Questionnaire			
		September 2021			
	#	Supplier Question	Answer	Supplier Comments	
	1	Does the CRM Platform support the listed functionalities for the Sales Function?			
	1a	Account Management			
	1b	Customer Contract Management (Commitment management / Pledges)	Yes No		
	1c	Partner Relationship Mgmt. (PRM)			
	1d	Opportunity & Pipeline Mgmt.			
	1e	Task / Activity Management			
	1f	Product Management			
	1g	Order Management			
	1h	Analytics on both donors/prospect and sales agents			
	2	Does the CRM Platform support the listed functionalities for the Marketing Function?			
	2a	Multi-channel Marketing			
	2b	Campaign Management			
	2c	Lead Management			
	2d	Marketing ROI Analytics			
	3	Does the CRM Platform support the listed functionalities for the Customer Support Function?			
	3a	Customer Support Portal			
	3b	Knowledge Base			
	3c	Call Center Features			
	3d	Support Analytics			
	4	Does the CRM Platform support the listed functionalities for Mobile and Social Media Function?			

Sheet1

- **Pricing**

In addition to the technical information, WVI is seeking to assess the related costs of the items below. These need to be submitted through our procurement system, COUPA.

- Cost of core modules per seat for the office with up to 10 seats
- Cost of core modules per seat for the office with 11-30 seats
- Cost of core modules per seat for the office with 31-50 seats
- Cost of core modules per seat for the office with more than 50 seats
- Cost of additional products the offices may need and their cost model
- Discount (% or USD amount) for global number of seats up to 300
- Discount (% or USD amount) for global number of seats from 301 to 500
- Discount (% or USD amount) for global number of seats from 501 to 700
- Discount (% or USD amount) for global number of seats above 700
- Average cost of deployment per site
- Annual Support cost
- Support cost model: per seat, per site, per incident, cost of support resources allocated to the WVI or other (please specify)

- Annual support cost estimates for the types of offices and number of global seats mentioned above
- Provide your Tiered Price List and any Non-profit / NGO discount information