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DOCUMENT III: Terms of Reference

1. TENDER CALL PURPOSE AND OVERVIEW

The purpose of this tender call is to solicit proposals of any interested company to develop and implement a comprehensive customer relationship management (CRM) solution for handling the organization's database of contacts, relationship with members and media activities. For all those companies interested in the tender, the technical requirements, as well as the evaluation criteria and further specifications, are further detailed in this document III (terms of reference) and in the document I (application procedures steps, evaluation criteria and awarding procedure).

1.1 Main objectives

The development, implementation and customization of a new CRM tool (SaaS or on premise customizable solutions) that aims to provide management of all UNWTO contacts in a comprehensive, organized and secure way, allowing effective implementation of marketing strategies, with quick and intuitive access to information from any place and type of mobile device.

Overall, the proposed solution needs to help achieve the following objectives:
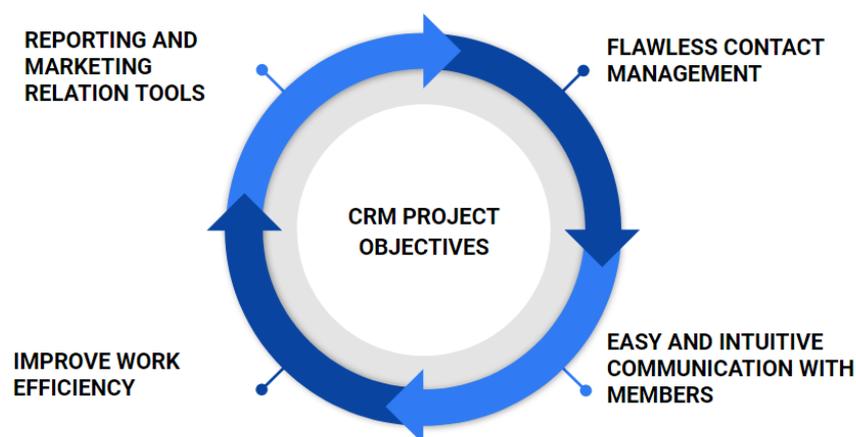
Allow for easy and intuitive contact and account management

- Allow the organization to create variety of customizable databases of groups of contacts according to its institutional needs
- Easy and intuitive management of contacts as well as prevention of duplicates

Improve and ensure flawless communication with members

- Develop better communication channels with members and allow the organization to communicate more effectively and guarantee that the right communication goes to the right contacts
- Allow the organization to be able to pursue a Relationship Marketing Strategy
- Help the organization to provide better customer service and increase the organization responsiveness and accessibility

Improve internal work efficiency

- Improve the internal work efficiency of the organization and reduce the time employees spend on administrative tasks
- Provide shared access to information and tools for task and project management

Provide tools for relationship marketing and reporting

- To collect customer related data and to allow to track interaction with members

IMPORTANT NOTE: Please note that due to the nature of work of UNWTO, the main objective of the CRM solution should be contact management, communication with members and improving work efficiency. Features such as sales tools, customer opportunity management, lead management and sales analytics, pipelines, etc. are not of importance to the work of the organization. Therefore, it is recommended not to include such features in the proposal unless justified their value and possible use in the context of the activities of the company.

1.2 Scope of UNWTO's activities and stakeholders

The World Tourism Organization (UNWTO) is the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism. As the leading international organization in the field of tourism, UNWTO promotes tourism as a driver of economic growth, inclusive development and environmental sustainability and offers leadership and support to the sector in advancing knowledge and tourism policies worldwide. UNWTO's membership includes 158 countries, 6 Associate Members and over 500 Affiliate Members representing the private sector, educational

institutions, tourism associations and local tourism authorities. More information about us, you can find at the following webpage: http://www2.unwto.org/.

It is important to underline that broadly defined stakeholders of UNWTO are primarily all the member states (public bodies), private sector partners, NGOs, experts in different areas of tourism, as well subscribers from the public interested in following up the activities of the organization. Therefore the solution should be able to accommodate an increasing number of contact details and respective actions of stakeholders that seek to establish or enhance their interaction with the organization. In addition, due to variety of contacts relationships, the solution should allowed a degree of flexibility and customization for each specific group.

1.3 Background

1.3.1 Current CRM software

UNWTO currently has a CiviCRM, open source WEB system, with several additional modules developed for the needs and requirements of the Organization. The CRM is connected to the Organization's website (Drupal), sharing users and displaying various contents stored in the CRM on the web. The CRM is used for the management of member contacts and the communications of the Organization.

The volume of contacts managed by the system reaches 273,000, with about 50 users of the tool. The most numerous mass mailings can reach 40,000 recipients, with an average of 90 monthly mailings.

In order to develop a new CRM a new platform will be provided, with similar or higher characteristics. In the technical proposal, if these technical specifications are not enough the bidder should explicitly mention on its proposal (including the minimum requierments).

1.3.2 Challenges faced

The current system, in addition to generating a high maintenance cost and limitations of technical and documentary support, does not cover all current and future needs.

The most problematic areas currently faced are:

- Very high % of undelivered mailings or ones being identified as spam
- Outdated and unreliable system that allows the creation of duplicates
- Inefficient system that needs high-maintenance
- Not user-friendly and not very intuitive interface

- Systematic problems with sending personalized communications in different languages; as well it does not allow contacts to be registered in more than one language
- Limited functionalities (database of contacts and sending mass mailings)
- Does not serve as platform for collaboration and shared access to information
- Does not provide any overview of interaction with contacts
- Does not track any activities of the members or generate any reports or statistics
- Does not offer any communication tools to the users
- Is not compatible or it has not been implemented correctly in order to be compatible with the current webpage of the organization and other software programs

2. GENERAL REQUIREMENTS

The company must present a proposal for a solution that covers all the needs and technical requirements defined in this document, highlighting advantages and disadvantages of the different existing solutions in the market and justifying the reason for the recommended CRM solution. The solution should seek to minimize the costs of future maintenance, retaining the objectives of the project.

It is anticipated that a single supplier will be selected to deliver the specified requirements, through the provision of an integrated software package and be responsible for successful implementation and ongoing support. The core component of the package will be a fully functional CRM software application - incorporating an integrated customer database and a full contact management suite – for supporting CRM, Marketing and Campaign Management. It is essential that the various components of the solution are fully integrated - (whether they be new modules (internal or external) or the existing legacy systems) – and that they work together seamlessly in order to deliver the required objectives and benefits.

The following sections defines, in some detail, the anticipated capabilities required that will address current issues and deliver planned business future needs.

It is essential that the proposed offer meets the following criteria:

- Customization capabilities and flexibility
- Design that prioritizes usability (intuitive, easy to understand and use)
- Seamless experience from desktop to mobile
- Expandable in future functionalities
- Be optimized for high performance and speed
- Guaranteed technical support
- Low maintenance

2.1 List of functional requirements

Requirements/Features	Short overview of organizational needs
Database Management	
Contacts Management	Custom fields and filters
Language options for contacts entry information	Allows contacts to be registered in multiple languages (English, Spanish and French) and automates as possible the process
Contacts mapping and categorization	Easy and intuitive
Different access for different users	Allows for different access to information according to users levels
Different views for different users	Allows for different display of information and categorization of customized fields
Mailings	
Mass mailings	Mass mailings to specific groups of contacts by using filters
Customizable templates	Allows the creation of different customizable mailing templates
Email list management and segmentation	Allows management and subdivision of contact lists by criteria
Customized tokens	Allows for personalized tokens to be introduced from the contacts basic information
Mailing languages	la Mailing languages: English, Spanish, French, Arabic and Russian The system should allow the user to predefine the language of the mailing (automatically personalizing the tokens, and as well as the headers/footers of the mailings in the predefined language)
Mailing recipients and CC	It needs to allow various combinations to be added at the same time for one mailing, as well as excluding or cc-ing recipients (or

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	groups of recipients) It needs also to allow to associate and assign relationship between contacts with option when an e-mail is send to X his associate Y contact to be cc
Downloads	
Inquiries (Excel, word, PDF)	Allows consultations and downloads of inquiries (word, pdf, excel) of any group of contacts by filtering or introducing specific criteria
Generation of labels	Allows generation of labels (word and pdf) of any group of contacts by filtering the system should allow the automatic generation of labels according to the specific filters applied as well as choosing from specifically predefined frequently used groups
Document Storage	File uploads- permits upload and downloads of internal documents and presentations
Account profile download	Allows basic profile download of a contact or groups of contacts according to predefined criteria
Task management	
Dashboard Management	Interface that provides users with quick access to information and common tasks
Task Management	Assigning tasks to teams, color coded icons for activities that are due, expired, or have not been assigned yet; Allows for automated scheduling with reminders, sends automatic emails for activities that are due on a certain day, etc.

Project management	Optional feature -please provide detailed information in the case the CRM solution could be integrated with any project management tools such as project planning, milestone tracking, budget management, Gantt charts, workflow reports, etc.
Integration	
Email Integration	Outlook
Other communication channels	Cisco Jabber, Skype
Calendar/ Reminder system	Integration between CRM and the organization's calendaring application (Outlook)
Integration with other apps	Web surveys, event registrations forms
Internal chat integration	Provides an in-house communication channels
Social media integration	Facebook, Instagram, Twitter, LinkedIn
Data management	
Deduplication	Identify and prevent duplicates
Data-Monitoring Dashboards	To provide a snapshot of subsections of the data by category, along with which values have the greatest entry rate and which are most frequently left unfilled. This informs admins on how the data management strategy, team training, and data entry rules can be adjusted to improve quality.
Subscribe/unsubscribe functions	The solution should support functions that can be triggered by stakeholders in order to be able to manage their data.
Automated check for inactive contacts	The solution proposed should embed automated functions for verifying inactive/inefficient contacts.

Marketing relations and reporting	
BI	Due to the nature of work, the company does not need any sophisticated BI tools such as analyzing big data, gathering and analyzing data to make better forecasts, etc. The use of analytics could be rather apply to showcasing general reports and overview of member activities, events carried out with them and report on members interests and activities.
Tools to plan, implement and evaluate marketing campaigns	Helps to improve members loyalty and the organization branding by better positioning
Marketing campaign reporting	Allows to analyses, interpret and act on marketing campaign results on social media

Allows to track interest and generate reports against pre-set KPIs |

2.2 Compatibility requirements

Compatibility with current legacy software
Compatible with SQL
Compatible and transferable with Oracle -needs to have an API so as the information on the invoices could be synchronized from the database
Compatibility with Outlook and mobile Phone
Compatibility and full integration with the webpage- Synchronized information from the website and the micro events webpages
Compatible with Intranet (double check to provide more info-synchronized info on back to office reports, web forms, etc.)

2.3 List of databases

Outline of the current databases of the organization which will require different customization and interface

Databases
Country
Members (public bodies)
Members (private sector)
Tourism Experts
Speakers
Specific departments main groups of contacts (5)
General subscribers

2.4 List of non-functional requirements

Non-functional requirements	
Requirements/Tools	**Short overview of organizational needs**
Advice on any additional functionalities that could be of value for the project	Additional concepts to the project will be valued, any ideas of extra features that can help the organization achieve the objectives of the project
Advice and support in order to achieve implementation success	Present a plan for implementation support
Training of staff	Initial training and onboarding support
Creation of a CRM guidebook	For users and admin
Data Management Plan	Develop data entry rules and guidelines that employees can reference when entering new data or maintaining existing records

3. OTHER SPECIFIC REQUIREMENTS

3.1 Language

The interface must be in English but it is also obligatory that the system is language friendly as recognized letters from other alphabets (Spanish, Arabic, Russian and French)

3.2 Institutional image

Allows to be customized to the organization image, logos,etc. You will be able to work together with the design team of UNWTO in order to make sure that the institutional image is reflected in the final solution.

3.3 Migration of information

The migration of the database needs to ideally allow the continues use of the current database until all the information is passed and verified in the new one. In this regards the migration plan must be agreed upon at the moment of signing the contract and that it will contemplate at least the deadlines and content to be migrated during the development and delivery of 100% of the project.

3.4 Warranty and maintenance

The successful bidder commits to a guarantee period of at least one year, once 100% of the project has been implemented, including compliance with all the requirements detailed in the functional analysis. During this period, the company that wins the contract must assume the correct functioning of the implemented functionalities, responding to those elements, systems or installations that present an incorrect and / or anomalous functioning and being at their charge all the actions, adjustments and necessary substitutions until its complete correction / restitution.
In the other hand, the bidder can offer an extension of the guarantee period for 3 more years as an optional value/cost to be considered if its offer is selected.

3.5 Hosting

UNWTO is both open to receiving proposals for SaaS and on premise solutions which could be hosted on the company's premises.
For a premise solution, the bidder should specify the minimum requirements of the server for hosting the service, in order to be ready for the deployment.

4. PRESENTATION OF PROPOSALS

Technical documentation to be submitted:

1. Summary of proposal- short PPT with key elements and presentation of the company
2. Detailed solution proposal that presents a detailed vision of the solution proposed and the modules included in the project, explains the approach of the company towards meeting the minimum functional requirements, specifies advantages and disadvantages, and as well suggests any additional ideas.
3. List of references of equivalent projects including contacts.
4. If available as an additional reference gives access for a demo of the proposed software
5. Outline of proposed work methodology, time and implementation plan as well as personnel assigned to the project

   Please note the following is valued for the personnel assigned to the project:

   The team must be formed by at least:
   1 Project Manager with 60 months of experience
   1 Senior developer with 48 months of experience
   1 Expert in web security with 36 months of experience

   The CVs of the personnel of this team must be attached in the technical proposal. They can be attached as an anonymous, but those CVs will be the minimum for each role of the team to develop this project.

   Information will be required on the professional profile, professional experience - clearly indicating one that is directly related to their participation in the project, dedication and qualification of the members of the work team.
   The project director must be the same throughout the project, and up to the date of delivery of 100% of it.

6. Training plan- the company will be asked to prepare and present a training plan and carry out a workshop (online or at the headquarters of the company). The training should contemplate two levels: technical approach for the IT team (3 people) and a more general training for general users (up to 30).
7. Other relevant functionalities/improvements porposals: that can be added later on to the system once the bidder is assigned and it could be consider for UNWTO. Once the CRM is fully operational, if UNWTO considers that is useful for the organization, those new functionalities can be requested to be implemented as an extra phase of the CRM system. Please consider that the technical offer must not have any cost related and in this matter the extra cost will be added as optional in the economical part.

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5. PROPOSED TIMETABLE AND ADMINISTRATIVE ARRANGEMENTS

Once the contract is signed it is estimated that the execution of the project will last about 3 to 4 months.

25-29 March 2019	Meetings with UNWTO to define deliverables and confirm all the TORs of the project
1 April- 31 May 2019	Development and implementation of the project
3 June 2019	Meeting on current progress, presentation of the current working version and defining final deliverables
3 June- 31 June 2019	Work on final deliverables and data migration
1 July- 15 July 2019	Final presentation, implementation and training

Documents to be delivered throughout the project:

- CRM technology recommendation and methodology document
- Roadmap and periodic report on development and ghant chart on deliverables
- Functional Analysis Document
- User Manual in English at user and administrator level.
- Installation and Configuration Manual, detailing the steps to follow to deploy the application in production, indicating the necessary parameters in the configuration files but also admin accounts. But also, include track changes of this document whenever some bug/misconfiguration/error or configuration change is done during the guarantee period (and also during maintenance if this is also purchased by UNWTO).
- Document on safety recommendations.
- Any other document that is necessary for the proper development of the project