

## REQUEST FOR PROPOSAL

**Reference: RFP 6/2024**

**Date: 23 October 2024**

**Subject: Design and development of custom functionalities and support provision on UNSSC's customer relationship management system (Salesforce)**

1. The United Nations System Staff College (UNSSC) is inviting the submission of proposals for the above subject, in accordance with this document and annexes attached hereto. Proposals must be submitted to UNSSC before **25 November 2024 by 23:59 (CET)**.
2. This request for proposal (RFP) consists of this document and the following annexes:
  - Annex A: Terms of Reference
  - Annex B: Terms and Conditions to submit a proposal
  - Annex C: Evaluation Criteria
3. Your proposal must include information in sufficient scope and detail to allow the Staff College to consider whether the proposer has the necessary capability, experience, knowledge, expertise and the required capacity to perform the work specified satisfactorily.
4. UNSSC reserves the right to request additional information regarding their commercial activities, history and resources.
5. Your technical and financial proposal must be submitted via email to [procurement@unssc.org](mailto:procurement@unssc.org). Non-compliant offers with the terms stated in this document and its annexes may be rejected without any evaluation.
6. Inquiries and clarifications concerning this RFP, along with changes or modifications to the proposals, must be submitted before the deadline via email to [procurement@unssc.org](mailto:procurement@unssc.org).
7. **Please note that the Staff College has VAT exemption status and can provide documentation for the same. Hence, your pricing should take this status into account and be presented net of VAT.**

## Annex A – Terms of Reference

### Background and Organizational Context

The United Nations System Staff College (UNSSC) is dedicated to serving the learning and knowledge needs of the UN system and partner organizations. We create first-rate learning experiences grounded in the bedrock values of multilateralism and dignity for all enshrined in the UN charter. Participants in our programmes rely on UNSSC to enhance their knowledge and skills across leadership and management, sustainable development, and peace and security. UNSSC is headquartered in Turin, Italy with an office in Bonn, Germany.

UNSSC delivers learning programmes and services to UN staff and partners at all levels, in all functions and locations. Its inter-agency mandate allows the Staff College to work in partnership with a wide array of UN entities, inter-governmental organizations, academic institutions, and civil society organizations.

UNSSC uses Salesforce (SF) as its customer relationship management system (CRM), including for managing participants to its learning activities. The Salesforce Team is located within the UNSSC Integrated Business Centre (IBC), in the Client Management Service team.

***UNSSC is seeking to expand Salesforce functionalities, specifically focused on the following areas of intervention:***

- *automation of business proposals (Opportunity Management), including the generation of standard templates for client's engagement;*
- *automation of client enquiries (e.g.: Case Management/ ticketing service);*
- *provision of business consulting, and implementation services related to UNSSC's CRM.*

### Objectives

The objectives of this project are:

1. To maximise the use of the current Salesforce org to streamline existing workflows, reduce manual intervention, and improve the quality of client interactions.
2. To create a shared, go-to-platform for supporting and facilitating client negotiation and interactions for UNSSC Programme staff;
3. To establish a long-term agreement related to Salesforce development and consulting services.

## Scope of Work

The selected provider will be responsible for the following activities:

### **Activity A) AUTOMATIC MANAGEMENT OF BUSINESS PROPOSALS: design, develop, and implement automated systems within Salesforce for creating and managing business proposals, generating Agreements for clients**

#### **1. Analysis**

- Review existing reports on business needs.
- Analyse the existing Salesforce CRM environment to identify current processes and gaps.
- Document functional requirements, business rules, and expected outcomes for automation.

#### **2. Design**

- Automate the creation, approval, tracking, and archiving of business proposals and the generation of standard agreements for clients. This includes the design of a dedicated tool to manage standardised prices and discounts.
- Develop architecture documentation, including any third-party integrations required for the automation.

#### **3. Customization**

- Customize Salesforce objects, fields, and workflows to support automations systems. Implement automated notifications, reminders, and escalations based on users' needs.

#### **4. Implementation**

- Implement automated processes for generating proposal templates, including the management of standardised prices and discounts, sending them for internal approval, and tracking client interactions.
- Automate the generation of standard agreements based on and linked to the proposal.

#### **5. Testing & Quality Assurance**

- Develop and execute a comprehensive testing plan, including: Unit tests for each automated process; integration tests with third-party tools (if applicable); user acceptance testing (UAT) to ensure functionality meets business requirements.
- Identify and address any issues found during testing to ensure a smooth launch.

#### **6. Training & Knowledge Transfer**

- Develop training materials and user guides to support staff in using the new automated features.
- Provide knowledge transfer sessions for internal technical teams for future maintenance.

### **7. Post-Implementation Support**

- Offer post-implementation support for a period **of 1 year** to ensure all automated systems work as intended.

### **Activity B) AUTOMATIC MANAGEMENT OF CLIENT ENQUIRIES: design and develop a system to track and manage client enquiries (e.g.: through Case Management/ ticketing service).**

#### **1. Analysis**

- Review existing reports on business needs. If necessary, conduct up to 3 interviews with key stakeholders identified by UNSSC.
- Analyse the existing Salesforce CRM environment to identify current processes and gaps.
- Document functional requirements, business rules, and expected outcomes for automation.

#### **2. Design**

- Automate the capture, categorization, assignment, response, and follow-up of client enquiries (external and internal).
- Develop architecture documentation, including any third-party integrations required for the automation.

#### **3. Customization**

- Customize Salesforce objects, fields, and workflows to support automations systems. Implement automated notifications, reminders, and escalations based on users' needs.

#### **4. Implementation**

- Automate the intake of client enquiries from various channels (email, web forms, social media, etc.).
- Implement automatic assignment to relevant team members based on predefined criteria.
- Set up automated follow-up and response workflows to ensure timely resolution.

#### **5. Testing & Quality Assurance**

- Develop and execute a comprehensive testing plan, including: Unit tests for each automated process; integration tests with third-party tools (if applicable); user acceptance testing (UAT) to ensure functionality meets business requirements.
- Identify and address any issues found during testing to ensure a smooth launch.

#### **6. Training & Knowledge Transfer**

- Provide knowledge transfer sessions for internal technical teams for future maintenance.

#### **7. Post-Implementation Support**

## Annex A – Terms of Reference

- Offer post-implementation support for a period **of 1 year** – including bug fixing - to ensure all automated systems work as intended.

### **Activity C) PROVISION OF BUSINESS CONSULTING, SUPPORT, AND IMPLEMENTATION SERVICES related to UNSSC's CRM**

- On a needs-basis provide business consulting, support and implementation services.

#### **Deliverables**

The expected deliverables are:

1. Design and implementation of a fully functional system on UNSSC's Salesforce CRM that creates, manages, tracks and updates business proposals; calculates standard pricing and discounts; and generates standard agreements , based on logical inputs, rules and approval flows in an automated way starting from pre-defined user inputs.
2. Design and implementation of a technical solution for managing enquiries from multiple channels from clients, fully integrated with the UNSSC Salesforce CRM.
3. Production of user guides and training materials for staff.

#### **Performance Indicators**

**Activity A):** 85% of UNSSC business proposals are smoothly managed and stored through the Salesforce CRM, resulting in the creation of a standard Agreement document if proposal is accepted.

**Activity B):** 99% of routine/repetitive enquiries are self-replied or re-directed to the relevant UNSSC team by an automated system, integrated in the Salesforce CRM, reducing the need for repetitive admin support.

## Annex B – Terms and Conditions to submit a proposal

### Submission of Proposals

Proposals must be submitted in English and shall contain the information described in the table below.

<b>TECHNICAL PROPOSAL</b>	<ol style="list-style-type: none"><li>1. <b>Company profile, with CVs</b> of the personnel made available for the project.;</li><li>2. Proposed <b>methodology</b> to deliver the services stated in Annex A of this RFP;</li><li>3. Description of the approach to meet UNSSC's needs with an <b>overview of the technologies</b>, methodologies, and solutions to carry out the work described in this RFP;</li><li>4. <b>Project plan</b> and timeline with start and end date, key milestones, and <b>project management approach</b>.</li><li>5. A list of <b>previous similar projects</b> to highlight your expertise with Salesforce relevant to this RFP.</li></ol>
<b>FINANCIAL PROPOSAL</b>	<p>Specify the <b>total cost</b> for performing the services under this RFP, with a breakdown based on the deliverables. Should your technical proposal include any recurrent costs (such as licenses for third-party software) such costs must be clearly identified as a separate cost element.</p> <p>Specify daily costs for <b>additional services</b>, including:</p> <ul style="list-style-type: none"><li>- Daily rate for business consulting;</li><li>- Daily rate for development and testing;</li><li>- Daily rate for general support.</li></ul>

### **The technical and financial proposal must be submitted in two separate files.**

You must provide all information required under this RFP and clearly and concisely respond to all points set out in this RFP. Any proposal that does not fully and comprehensively address this RFP may be rejected. However, unnecessarily elaborate brochures and other presentations beyond those sufficient to present complete and effective proposals are not encouraged.

Following the submission of the proposals and final evaluation, UNSSC will have the right to retain unsuccessful proposals. It is the proposer's responsibility to identify any information of a confidential or proprietary nature contained in its proposal, so that it may be handled accordingly.

### **No Commitment**

This RFP does not commit UNSSC to consider any proposal, to award a contract or to pay any costs incurred in the preparation or submission of proposals, or any costs incurred in making necessary studies for the preparation thereof, or to procure or contract for services or goods.

UNSSC reserves the right to reject any or all proposals received in response to this RFP and to negotiate with any of the proposers or other firms in any manner deemed to be in the best interest of UNSSC.

## Annex B – Terms and Conditions to submit a proposal

This RFP contains no contractual proposal or offer of any kind; any proposal submitted will be regarded as an offer by the proposer and not as an acceptance by the proposer of any proposal or offer by UNSSC. No contractual relationship will exist except pursuant to a written contract document signed by the authorized official of UNSSC and by an authorized representative of the successful proposer(s).

### **Rejection of Proposals**

UNSSC reserves the right to reject any proposals that, inter alia:

- i. are received after the deadline stipulated in the RFP;
- ii. are not properly marked or addressed as required in the RFP;
- iii. contain an alternate proposal or;
- iv. are not otherwise in compliance with the RFP.

### **Ethical Standards**

All UN vendors shall adhere to the highest ethical standards, both during the procurement process and throughout the performance of a contract.

### **Contract**

UNSSC shall enter into an agreement for the provision of services with the highest-scoring proposer in accordance with Annex C on a non-exclusive basis. The contract shall contain the option for UNSSC to commission additional advisory services (calculated on a daily basis) in the areas related to this RFP for a period of three years.

The award of the contract pursuant to the terms stated in this proposal, including its annexes, is subject to the United Nations General Conditions of Contracts (UNGCC). The applicable text of the UNGCC is available at the following address:

[https://www.un.org/Depts/ptd/sites/www.un.org.Depts.ptd/files/files/attachme nt/page/pdf/general\\_condition\\_services.pdf](https://www.un.org/Depts/ptd/sites/www.un.org.Depts.ptd/files/files/attachme nt/page/pdf/general_condition_services.pdf)

Full acceptance of the UNGCC is a mandatory requirement for the award of the contract(s); non-acceptance of the UNGCC may result in the rejection of the proposal.

### **Travel**

This engagement may require successful proposers to undergo travel to complete the tasks of this RFP. The UNSSC will arrange travel in accordance with its travel policies, rules and administrative instructions. Travel costs should not be indicated in the financial proposals.

Proposers must ensure that they have the required authorizations, visas or medical clearances to undergo travel to Turin, Italy.

## Annex C – Evaluation Criteria

The proposals shall be evaluated in accordance with the criteria indicated in the table below.

<b>PRE-REQUISITE</b>	<ul style="list-style-type: none"> <li>• Valid certificate of incorporation</li> <li>• Minimum three years of operations in areas relevant to this RFP.</li> <li>• Project lead with minimum 10 years of experience in areas relevant to this RFP.</li> <li>• Full English proficiency.</li> </ul>	
<b>TECHNICAL PROPOSAL</b>	<ul style="list-style-type: none"> <li>• Technical expertise and experience assessed on the basis of the case studies submitted.</li> </ul>	400 points
	<ul style="list-style-type: none"> <li>• Proposed methodology and approach to meet UNSSC's requirements, including approaches to minimize the use of custom code;</li> </ul>	400 points
	<ul style="list-style-type: none"> <li>• Quality and relevance of the project management approach, including timeline.</li> </ul>	200 points
<b>FINANCIAL PROPOSAL</b>	<ul style="list-style-type: none"> <li>• Indicate the total cost for the provision of the deliverables stated in Annex A divided by deliverables A and B.</li> <li>• Indicate the daily cost for additional advisory services.</li> </ul>	

A two-stage procedure is utilized in evaluating the submissions, with evaluation of the technical components being completed prior to any financial proposals being opened and compared. The financial proposals will be opened only for submissions that pass the minimum technical score of 60% (600 points) of the obtainable score of 1,000 points in the evaluation of the technical component.

Maximum 300 points will be given to the lowest offer and the other financial proposals will receive points inversely proportional to their financial offers. i.e.  $S_f = 30 \times F_m / F$ , in which  $S_f$  is the financial score,  $F_m$  is the lowest price and  $F$  the price of the submission under consideration.