



## **FINCA Afghanistan**

### **Customer Relationship Management Software (CRM)**

#### **Request for Proposal**

**February 04, 2021**

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## 1. Confidential and proprietary

This Request for Proposal (“RFP”) has been prepared by FINCA Afghanistan (“FINCA” or “we”) and is being given to you (“Vendor”) to provide you with an opportunity to participate in CRM application (“Customer Relationship Management Software (CRM)” or “the system”) selection process, in consideration of your agreement to treat it as confidential.

The information enclosed in this document is proprietary to FINCA. The release and use by you in preparation of a response to the RFP do not convey any ownership to any party by FINCA’s disclosure of this information.

By accepting this document, you agree that you will treat this information as confidential and you will not use it for any other purpose than to prepare the requested response. This information may not be disclosed to others without the express written consent of an authorized representative of FINCA Afghanistan.

You will return this document, and all copies you have made of it, to FINCA upon FINCA’s request or if you should decline to submit responses. You will also return any additional hard copies of this document and delete any electronic copies.

### 1.1 Profile of FINCA Afghanistan

FINCA Afghanistan is a incorporated and operating since 2003 under Laws of Afghanistan with License number # I -11006 from Ministry of Commerce and Industries and having its head office at \_ House # 21, Main street, Shaheed Square, Shahr-e-Naw, PD10 Kabul, Afghanistan and has 20 branches and 3 market offices, established in rural and urban areas of the country (primarily in the Central Regions, North, and the West).

The institution disbursed its first loans in Herat province through the group lending model. In 2007, FINCA Afghanistan opened its first branch in Kabul. It disbursed its first individual loans in 2011 and now offers a range of individual loan products while continuing to serve credit groups.

### 1.2 FINCA Afghanistan RFP

Through this RFP, FINCA Afghanistan is looking for a system that is directly involved in the FINCA Afghanistan’s business.

Purpose of this RFP: FINCA Afghanistan is seeking a new CRM application system to implement in our subsidiary located in FINCA Afghanistan.

#### 1.2.1 Products and Services

By offering loans to micro-entrepreneurs, FINCA Afghanistan provides its customers with a sustainable way to build their business and ultimately improve the quality of life for themselves and their families. FINCA Afghanistan Loan Products are as follows:

Products
Small and Medium Enterprise (SME)
Small Enterprise Loan (SEL)
Business Murabaha Agreement (BMA)
Emergency Credit Line (ECL)
Women Murabaha Group (WMG)
Agriculture and Livestock
Home Improvement Loan
Women SME & Staff loan

## 2. Background and scope

FINCA Afghanistan intends to install and implement Customer Relationship Management Software (“CRM”). The vendor should give as much information as possible about their capability to design, plan, install, implement & sustain a Customer Relationship Management (CRM) Solution and manage the process from end to end using structured methodologies and skilled personnel including after sale service.

We look forward to select the CRM application that will fulfill our current needs as Microfinance and deposit microfinance institutions (MFI and DMFI), providing loan services. In addition, we would like to have greater efficiency in operations by enabling rapid deployment of new features and innovations and proper reporting to respective authorities (regulatory, tax, AML, FINCA’s HQ).

The supplier shall provide pricing based on the following deployment options

- I. On Premise;
- II. Cloud; subject to regulatory approval.
- III. Hybrid (On Premise & Cloud)

With this RFP we request:

- Information about your company, products and services pertaining to the requirements outlined in APPENDIX A & APPENDIX B.
- Commercial proposal to FINCA on licensing, implementation and support of recommended CRM application.
- Information about other clients, work history, top contracts with other clients, company leadership & Hierarchy, Case studies (if any)

We welcome your response and look forward to hearing about how your organization can support our business as we embark on this important strategic journey.

### 2.1 RFP process schedule

The following is the expected timetable for distribution and submission of RFP responses.

<i>Event</i>	<i>Date</i>
RFP announcement in websites	Feberuary 04, 2021
Vendor questions due date	Feberuary 12, 2021
RFP Responses due date	Feberuary 18, 2021
Confirmation of vendors / systems selected for demo	Feberuary 27, 2021
Vendor demo sessions	Feberuary 28, 2021
Evaluation of proposals and demos	March 05, 2021
Selection and approvals	March 10, 2021

FINCA reserves a right to modify above mentioned planned activities as well as proposed timeframes at any time.

All responses to the RFP are due by **4:00 PM, Kabul Times on Feberuary 18, 2021**. The preferred method of submission is via email.

FINCA has no obligation to disclose Vendors’ identities to other Vendors.

### **3. Requirements overview**

The following section contains an overview of business requirements that FINCA expect from the CRM solution.

#### **3.1 CRM business requirements**

FINCA Afghanistan is a unique organization that is complex because it requires the establishment of CRM for operating in a highly capable into an efficient and effective platform.

FINCA requires a CRM application with features that are functional and flexible that will allow FINCA Afghanistan to provide customer relationship management services to customers.

The required CRM application should allow FINCA Afghanistan to comply with country-specific regulations.

CRM application should have the ability to integrate with external systems, including interfaces provided by FINCA Afghanistan.

Below are some business requirements of FINCA Afghanistan and detailed are mentioned in operational needs section.

- Customer contact management
- Integrated with social media and CBS for data capturing
- Identification of Digital leads from system
- Customer interaction tracking management
- Lead management through social media Applications
- Email integration for call center agents/supervisors
- Document management
- Pipeline management
- Workflow automation
- Reporting and analytics
- Agents KPIs and performance management
- Real time dashboard
- Call management
- Forecasting
- Marketing automation and email marketing

Other requirements are mentioned below in marketing and operational section.

### 3.1.1 Products and services

A candidate CRM application must contain robust functionality to support current operational needs, as well as processes and activities planned in the foreseeable future.

#### 3.1.1.1 Current operational & Marketing needs

The list of functionalities of the Software that you are providing, should cover below areas.



## CRM Functional Specification by Operation

<b>User Management:</b>	<b>Report Generation:</b>	<b>Tracking:</b>
User Limit / Unlimited	Live dashboard	Record: Attended Calls
User Roles	Total Calls Dailed	Record: Missed Calls
User Rights	Total Calls Attended	Record: Unattended Calls
User Setup for Agent	Total Calls Rejected	Record: Off-numbers
User Setup for Supervisor	Total Calls Not Responded	Record: Wrong-numbers
	Total Wrong Numbers	Record: Client Feedback
<b>Product Management:</b>	Total Off Numbers	Track: Messages
Product Setup	Total Calls Unreached	Track: Daily Repayment
Survey	Agent-wise KPI Summary	Track: Channel of Disbursement (facebook)
Collection	Agent-wise KPI Detail	Track: Channel of Collection (CC, branch)
Recovery	Report Since Inception	Track: Channel of Recovery (branch, CC)
Sales Top up	Branch-wise KPI Report	
Sales Repeat	Region-wise KPI Report	
Sales Lead		<b>Reminder:</b>
Tracing		Popup: Next Follow Up
	<b>Integration:</b>	Popup: Payment Due Date
	Facebook	Popup: 5 Days before Due Date
	WhatsApp	
<b>KPI Management: (Target vs actual)</b>	CBS	<b>Audit/Risk Option:</b>
Sales: All Information of Client	Manual Upload	Options for Audit Purposes
Recovery: All Information of Client	Manual Import/Export	
Collection: All Information of Client		
Lead Generation		
Tracing		
	<b>Reconciliation:</b>	<b>Remote working option</b>
<b>Call Management:</b>	Transaction vs. Collection List	Web browsing by person phon/CPU
In-bound	Actual Disbursement vs. ASAN List	Dynamic number show
Out-bound	Actual Recovery vs. Write-off List	Application install
Single SIM		Off line working
Multi-SIM		Online working if online how much internet is requ
Auto-dail		
Call coaching		
Call barging		
IVR Connectivity		
Auto Call Record		
Conference call		
Transfer call		
User log in hour control		
User active/ in active option		
User call time limitation option		
User control for receiving and disconnecting incoming calls		

## Requirements of Collection/Recovery Department

Write Vs. Recovery list	Officer wise target Vs Recovery	Branch wise Fraud Vs Recovery	Officer wise Transfer
No of Calls	Target No. of clients	Type of Loan	Submit by
Successful calls	Target Amount	Record of status	Received by
No of recovered	Editable both Targets	Date of fraud update	No of clients
Amount of Recovered	Option for multipal target for each officer	Fraud by	Write off amount
Principal		Date of Fruad	Transfer date
Mark up		Fraud Vs Recovery	Bench mark for officer
Recovered by			
Paid by			
Date of visit			
Collection date			
Write off date			
Reason of write off			
Type of write off			
Branch-wise wite off Vs Reoccovery	Officer wise write off Vs Recovery details	Branch wise litigation Vs Recovery	
No of write off recovery	Amount of Write off Vs Reoccovery	Registered Amount	
Amout of write off recovery	No of Client write off Vs Recovery	No of client registered	
Recovery by Product	Business type	legal status	
Recovery by department	Product	Police	
	Application details	Rights department of MOJ	
	business Add	Attorney General Office	
	Phone number	Primary Court	
	loan amount	Secondary court	
	Write off date	Supreme Court	
	Total remaining balance principle and mark up penalty	Recovered amount	
	No. of paid months	Resolved without registration	

## Requirement Specification of Risk department

1. CRM must have an audit trail of activities – User should be able to track the performed activities in CRM	4. Monitoring Reports for activities such as:
2. CRM must have a comprehensive complaint handling process.	a. Lead generation and their status.
3. Access to communication between agents and customers for quality check and audit purposes.	b. Compliant registered with their status (process time and resolution).
Additionally, System should have the capacity to develop custom report for monitoring proposes.	

## CRM Functional Specification by Marketing and Product Development Department

Main Dashboard:	Contact Management:
Check/Review Daily Activities	Add/Edit/Delete Contact, Assign to agents
Check/Review/Assign/Del Activities	Contact Information Management
Sub-Users Management, Activities, status update	Contact process stages
Customized Reporting Panels	Contact Listing and Reporting
360 view information of customers	Contact Email/Messeging/Call Option
User Management:	Survey Management:
User Management	Develop Automatic Survey Forms & entry of Outcomes
Add/Edit/Delete User	Generate Report for Survey Contact/Lead Modules
User Access/Role Management	Generate Survey Report
	Generate Analytics Report (Chart/Figures)
Activities Tracker and Reminder:	
Add/Edit/Delete Activities	
Assign/Edit/Remind Activities	
Alert/Remind (Call/SMS) about pending activities	
Generate Report of Activities (Todo list/Completed/Pending)	

<b>Lead Management:</b>	<b>Product Management:</b>
Lead capture (where are the leads coming from? Social Media, DFA, Tablet lending, Website, Google or any other)	Product Setup
Lead tracking (what is their journey) assign them to related person, know their status	Product Stage Management
Lead qualification (along) their journey, the system should show prioritization of leads and we can provide scores to leads.	Product Milestone Reporting
Lead distribution (who takes the leads? Call center? Branch?)	Product Log Management
lead nurturing (not all leads go in a straight line and convert) Highlight them so I can identify marketing strategies for them.	
Can Add/Edit/Delete Lead manually as well	Option to add/Assign Project Tasks
Show Lead Status	Monitor Project Activities KPI
Identify Lead stages/process, categories them based on process	Option to Check/Review Progress
Systematic Lead Conversation process	Detailed Summary of Project+Costing
Lead Reporting	<b>Sales Management:</b>
Integration with Facebook/Twitter/Instagram/Linkedin/WhatsApp/Finca Website/ Google Analytics, Ads/youtube and other digital platforms	Sales(Converted Leads)
	Daily Sales Updates
Ability to identify MQL (Marketing Qualified Leads) & TQL (Total Qualified Leads) SQL (Sales Qualified Leads) from MIS System, Website and Social Media	Sales Feedback
Identify CPL (Cost per Lead), CPA (Cost per Acquisition) & Benchmarking of CPL and CPA.	Retention and Referral Option (unsuccessful sales)
Identify LTV (Customer Lifetime value)	Set Sales Target (Leads to Sales)
Determination of Offline leads.	Sales Staging and Follow ups Option
The ability to identify the conversion optimization	Sales Report Generation
Automatic Recordings of Traffics, leads from digital platforms and website and preparation of its reports to call center team. After recordings, the software should be able to identify the converted customers from those leads. It should have the ability to match the customers and leads and identify the prospective converted customers from leads.	Notifications sender to customers
Identify the leads from Google analytics (google ads) and integration of system with google analytics (Ads).	
Complete Lead Analytics and Management	

### **Other Additional Requirments (Technological)**

- Workflow automation.
- User Management.
- Access and rights Management.
- User activities log.
- Contact Management.
- Reports and Dashboards.
- Real-time data functionality.
- Mobile CRM.
- built-in social media monitoring features.
- Adaptable to changes and customization.
- Notifications system.
- track agent activity and performance.
- Live chat functionally
- API to be integrate with third party application.
- Backup and sync data with cloud backup storage services.
- Infrastructure requirements for both on-premise and cloude solutions including disaster recovery and UAT environment.

### **3.1.3 Reporting**

The CRM application should have robust ad hoc reporting capabilities that are intuitive to a typical end user with a minimal amount of training. The system should also have built-in reporting capabilities that can extend to other systems and databases for more extensive Business Intelligence (“BI”) technologies, such as data mining, process mining and online analytical processing.

The reporting features shall include:

- Regular reports required by the Institution for MIS/control purposes
- Detailed audit trail
- All the reports shall have the capability to be generated in Microsoft Excel (mandatory), TXT format or PDF, at least
- Marketing leads reports and other specification reports mentioned in marketing specification section

The CRM application solution must contain robust reporting capabilities, including the ability to leverage thorough “out-of-the-box” reporting capabilities, but also the option to perform ad hoc reporting. End-users must have the ability to define basic parameters for which they would like to observe the data presented (e.g., date ranges).

### **3.1.4 Financial Information**

1. daily reconciliation reporting (collected vs. expected)
2. currencies: AFA
3. Entities: commercial banks, microfinance banks, microfinance institutes, MNOs
4. Calenders: 01 January – 31 December (user should be able to mark holidays)

### **3.1.5 Languages**

English

### **3.1.6 Regulatory compliance**

The service provider is obliged to investigate the legality of its works and the system based Intellectual Property Law and based on Da Afghanistan Bank Law, Banking Law, AML, CFTL, and any other laws and regulations of Afghanistan. If this investigation is not done, and consequently it will be considered illegal by the government, all the costs will be born by the vendor.

### **3.1.7 Data input requirements**

In addition to transaction entry through the User Interface, it is very important for CRM application to support a variety of transition input methods, such as:

- Batch uploads
- Online interfaces, allowing real-time data exchange with external sources (APIs, Messaging, Core Banking System, and etc.)

Also, provide alerting mechanism when static data has been changed on the system.

## **3.2 Technical requirements**

While FINCA is flexible and willing to consider a wide range of proposed solutions, a few technical requirements have been identified as mandatory specifications to ensure compatibility with our existing operations and IT infrastructure, as well as our existing strategic investments in technology. The following sections will discuss these areas in detail.

### **3.2.1 Hosting**

FINCA requires flexible deployment architecture for CRM application that can accommodate the connectivity infrastructure within Afghanistan. Alternative deployment models (in-premise and / or cloud based, according to the local regulation requirements) should be available to ensure stable performance and operability of CRM application within the constraints of the connectivity infrastructure in the head office of the subsidiary and any branch locations.

### **3.2.2 Database platform**

At FINCA Afghanistan, we prefer a database platform that will allow seamless and direct linkage to our other major IT systems.

FINCA Afghanistan's existing skillsets and capabilities mainly consist of experience with Microsoft SQL Server and Oracle database languages.

### **3.2.3 Application delivery and environment**

FINCA Afghanistan would like to explore various deployment methods for the CRM application. These methods include both a Web-based user interface, which must also be "browser agnostic." Alternatively, if the user interface is accessed through a "thick client," then this application must be certified to run seamlessly using industry-standard thin-client application delivery methods (e.g., Citrix and Thin App). Please provide an explanation about your solutions capabilities for application delivery based on FINCA Afghanistan's requirements.

### **3.2.4 Channels**

To enable the Finance and Microfinance institutions to provide comprehensive and competitive services through Alternate Delivery Channels, the Vendor should provide either itself or through tie-up with other service providers.

The required service delivery channels include, but are not limited to:

- Integration of CRM with existing CBS applications

- Integration with third party application such as facebook, twitter, WhatsApp, FINCA Website, and Instagram.

The above services should be an end to end service from origination to completion with appropriate interfaces and safety features, having as the minimum requirements: encryption, fraud detection etc. built-in, where warranted or mandatory. The solution should also have automated reconciliation, reports / MIS generation capabilities.

Include any additional information that the vendor should know as a restriction or requirement about some of the listed services.

### **3.2.5 Integration**

The CRM application must integrate with various other strategic applications already in place at FINCA Afghanistan and at the end of the project, they should be running. These high-value business integrations shall include:

- Integration with;
  1. Loan Tracking System (CBS through middleware)
  2. In case FINCA change its CBS, CRM vendor has to integrate with new CBS within this proposal.
  3. Website, google and other social media platforms indicated in marketing specification section

If the CRM includes those other systems as sub-modules, should be desirable, but not mandatory.

### **3.2.6 Information security**

The CRM System must comply with FINCA International's Global Information Security Policy (based on best industry practices and international security standards).

The system should be delivered in a secure configuration, with changes required to comply with applicable guidance from FINCA's Global Information Security policy derived documents. In all areas where compliance is not possible, or where it would materially impact fitness for purpose, those areas should be identified, and the trade-off between security compliance and functionality clearly explained.

Using Active Directory integration to manage user roles and accounts is strongly preferred. In either case, each user must have a unique user ID and authentication credentials. All credentials should be managed from a centralized console, either through Active Directory or the CRM application console.

The CRM application implementation shall support the segregation of duties, with access controls to prevent users from viewing data without explicit authorization (e.g. each user can only view data within their own company, and consistent with their job function). Also, shall provide the ability to query the audit log by type of access, date and stamp range, user identification or terminal ID.

Maintain an audit logging capability to record access activity including:

- All login/logout attempts by user and workstation,
- User submitted transactions,
- Initiated processes,
- System override events, and
- Direct additions, changes or deletions to application-maintained data.

Include red flag reports and real time alerts for system users performing suspicious or unusual transactions. Provide real time alerts for super-users or other sensitive users every time they log in or they change their system password.

### **3.2.6.1 Personal Data Protection**

The CRM application shall protect customer data by encrypting or anonymizing of Personally Identifiable Information. Encryption functions shall use current encryption and hashing algorithms (such as AES256, SHA256 or stronger), eschewing deprecated algorithms (DES, MD4, MD5 etc.).

Allow the system administrator to restrict access to sensitive data elements such as ID number and banking information by named user, groups or users, or functional role.

Provide audit trails to trace transactions from their initial source through all stages of related system processing. The initial source may be source documents, transactions originating from other systems, or internal system-generated transactions.

### **3.2.7 Workflow capability**

Business process automation is a core business driver and benefit anticipated through the implementation of a CRM application. The CRM should have the capability to automate business processes and provide greater assurance through the electronic documentation of key process and control tasks. The CRM solution is expected to provide core workflow capabilities for all key modules outlined in Section 3.1.1.

In other words, the vendor solution must provide an integrated workflow management capability that is tracked and properly logged, including generated and routing internal forms, reports and other financial documents for real-time approval or subsequent processing.

### **3.2.8 Printing**

The users should be able to print the documents, reports, charts etc from CRM system directly.

### **3.2.9 Support**

Support for the system must be available for list of timezones Kabul Times, 24x7, and available in English (mandatory) and other required languages; N/A (value added).

Furthermore, the CRM solution provider is expected to have an excellent client service track record, including ITIL best practices and SLA accomplishments.

## **4. Response terms and conditions**

The following response terms and conditions have been defined to ensure the most fair and efficient selection process as possible:

- The contents of this RFP are deemed confidential and are provided to you for purposes of responding to this RFP. This information may not be disclosed to others without the express written consent of an authorized representative of FINCA Afghanistan
- Information submitted in response to this RFP will become the property of FINCA Afghanistan; FINCA Afghanistan will not pay for any information herein requested, and FINCA Afghanistan shall not be liable for any costs incurred by any supplier.
- FINCA Afghanistan has no obligation to disclose bidders' identities to other bidders.
- Any information contained in the Response that is proprietary or confidential must be clearly designated. FINCA Afghanistan will reasonably maintain the confidentiality of Vendor's Confidential information if directly marked "Confidential Information"
- Prime contractor or other involved parties (if different than the software publishing company) should be identified with appropriate contact names and phone numbers.
- FINCA Afghanistan will not reimburse any Vendor or respondent for any costs associated with preparing a response to this RFP.

- Attempts to communicate with the company outside of the process outlined in this RFP could result in your company’s removal from the vendor selection process.
- Cooperating with and adhering to this time frame and process will be a factor in considering your product as a potential solution.

## 5. Contents of proposal

Please submit your proposal utilizing the format detailed below within this section.

All responses are to be incorporated through pre-determined response templates annexed to this document.

Please do not delete rows/columns within the response template in your proposal submission.

Please be sure to include in your response sufficiently detailed explanations of the current status of requested business and technical requirements. **Responses that lack details explaining the functionality of your system will be viewed unfavorably.**

If you feel an answer requires detailed information (reference to an attachment), please indicate the reference to the additional information in respective section of the response template and provide additional information as an attachment to the template.

### 5.1 Appendix A: Vendor’s response template

The template consists of five worksheets dedicated to company, product and partner companies. Submit your responses in cells next to the question. Please, add columns for additional products and companies as necessary.

- **Company profile** – complete sections related to company profile and major customers for the completed projects. Provide information about your major customers (banks and financial Institutions). In addition, please, indicate your customers located in the countries of the above subsidiaries.
- **Product Information** – Provide information related to the proposed CRM application capabilities against the requirements stated under Paragraph 3 of this document. Including: current proposed version, functional capabilities, new and enhanced features, and your product’s road map detailing future enhancements of your product, etc.
- **Licensing and Support** – provide information about licensing and support terms for all products referred in “Product Information” worksheet.
- **Technical, Implementation and consulting** – provide technical proposal, information about terms of consulting services for all products referred in “Product Information” worksheet.
- **Partner companies** – list your partner companies, providing the listed types of services to your products.

### 5.2 Appendix B: Business Requirements

The appendix document contains information regarding the detailed business requirements that FINCA requires from a candidate CRM solution.

Submit your responses under the following columns of Functionality Requirements worksheet:

Column	Instruction
Support Status	Indicate relevant support status for each requirement: <ul style="list-style-type: none"> <li>• Fully Supported</li> <li>• Partially Supported</li> <li>• Not supported; Can be customized</li> <li>• Not supported; Cannot be customized</li> </ul>
Functionality Description	Describe CRM functionality against the required features.

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Column	Instruction
Additional Comments	Additional Comments (Optional)

### 5.3 Appendix C: Total cost of ownership template

#### 5.3.1 Software licenses and support fees

Please provide a schedule of your proposed license and support fees associated with CRM System and software required for its deployment – database, operating system, CRM and other third-party applications.

#### 5.3.2 Infrastructure costs

Please provide a detailed breakdown of one-time and recurring infrastructure costs, based on recommended hardware sizing.

#### 5.3.3 Implementation costs

Please provide a detailed breakdown of the costs anticipated during CRM implementation phase.

- **Consulting Services** – indicate number of consultants engaged in implementation project, providing estimated terms of engagement and associated rates; Estimate consultancy fees related to each phase of overall implementation activity.
- **Travel, accommodation, incidentals** – provide estimated cost associated with onsite presence of CRM consulting team (travel, accommodation, incidentals).
- **Application development costs** – costs related to development of customization and localization changes essential for delivery of required functionality features (Appendix B: Business Requirements).
- **Implementation of third-party systems** – costs associated with implementation of any third-party system required for deployment of CRM (if applicable).
- **Additional costs** – Please describe any other commercial terms FINCA should be aware of.
- **Any recurring costs** – such as AMC.

### 5.4 Additional documentation

#### 5.4.1 Team resumes

Please provide resumes and professional certifications of the proposed team members. Summarize the experience of the engagement team with respect to coordination and responsibilities inherent in completing an integration of this scope and complexity.

#### 5.4.2 Project organizational chart

Describe the engagement team organization, how the engagement will be coordinated, and how this engagement management approach will contribute to the efficiency and cost effectiveness of the project. Be sure to provide details on any offshore resources that will be used.

#### 5.4.3 Subcontracting

Identify your firm's approach to staffing portions of this engagement with subcontracted labor.

#### 5.4.4 References

Provide a list of three to five references that may be contacted for each member of the engagement team to allow for an independent view of their approach to client service.

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Describe what you believe are the key areas the selected engagement team will assist us in the successful implementation of the CRM application. Also, provide examples of what your engagement team members and your firm have provided to clients that display your commitment to quality and client satisfaction.

## 6. Selection criteria

### 6.1 Evaluation of responses

The vendor and software product selection decision will be based upon the high-level criteria detailed below. We reserve the right to add additional criteria and to determine weighting of criteria for determining the final solution software and vendor. No vendor submitting information based upon this RFP has a proprietary interest or automatic rights to selection, regardless of past contractual/project history with FINCA.

#### Scoring criteria

**Vendor experience and qualifications** – demonstrated experience and qualifications to assess the ability to deploy CRM successfully in commercial bank, and microfinance institutions in an environment similar to FINCA’s (e.g., industry experience, implementation methodology, ability to manage implementation risks, and mitigation strategies).

**Functionality features** – ability of CRM to meet FINCA’s stated business requirements and integrate into or enhance FINCA’s business processes. Additionally, fit with our existing architecture and application landscape will be a key consideration.

**Technology platform** – upgradable and scalable technology platform that enables stable performance and easy integration.

**Ease of implementation, use and support** – CRM solution’s perceived adaptability amongst the end-user community within FINCA’s global organization (e.g., intuitive user interface, ease of deployment, ease of ongoing maintenance, local support, specifically in regional time zones and in FINCA’s official languages).

**Total cost of ownership** – Total cost of ownership (e.g., initial and ongoing software license and maintenance costs, infrastructure acquisition costs, application development costs, systems integration labor costs, and organizational training costs).

FINCA will analyze the responses from CRM vendors using a scoring methodology. Each respondent will be evaluated based on the completeness of the requirement responses.

### 6.2 Vendor demonstrations and score validation

Selected vendors will be invited to demonstrate the capabilities of their product to decision stakeholders in a structured setting that leverages FINCA-developed demonstration scenarios. FINCA will evaluate CRM application vendors’ demonstrations to grade on the quality of product, industry experience, ability to partner, ease of adoption, and demonstrated knowledge of FINCA’s business (i.e., adherence to provided demonstration scripts). FINCA reserves the right to add or modify the selection criteria at any time.

Demonstrations are scheduled to occur during **February 28 -2021**. For professional services providers, we expect an oral presentation to occur. A date and place for this oral presentation will be provided by the FINCA Afghanistan Project Management Office to the selected vendors.

### 6.3 Reference checks

FINCA requests the option to contact your existing customers to discuss CRM capabilities, product satisfaction and implementation experiences.

FINCA reserves the right to perform necessary background check and references and qualifications checks as deemed necessary.

#### **6.4 Vendor selection**

The selected vendor will be identified solely by the judgment and discretion of FINCA. The vendors will be evaluated based on how fully each demonstration and proposal meets the requirements of this RFP.

### **7. Communication and Q&A protocol**

We acknowledge that vendors might have questions regarding the RFP, as well as the requirements outlined herein. To assist in helping you to become well equipped to respond effectively to our needs, we are offering to make the FINCA Afghanistan PMO available in the following ways:

#### **7.1 Vendor introduction calls**

From **February 28 –2021** the selected vendors will provide the demos according to our requirements.

#### **7.2 Written inquiries**

Until February 18, 2021 all candidate vendors may be able to submit written inquiries, which will be answered within 5 working days from the date of submission.

#### **7.3 Vendor demonstrations**

During the period from **February 28 - 2021** a vendor demonstration event will be held where selected candidates will be provided with the opportunity to showcase their products and service capabilities in the context of FINCA's business requirements. The place will be informed to the selected candidates.

The vendor demonstration requests will be delivered to selected vendors before February 15, 2021. The request will be delivered along with the demonstration agenda, which will provide the "playbook" from which FINCA will ask vendors to conduct the demonstration.

Please note that adherence to the demonstration agenda will be extremely important as it will allow the business to assess the CRM solution in the context of the business, but also will demonstrate the vendor's ability to partner with FINCA and listen to its needs.

### **8. Next Steps**

As noted above, FINCA is beginning the process of selecting their CRM application. Completed proposals must be submitted based on the date specified in the timetable provided under paragraph **2.1 RFP process schedule**.

FINCA reserves a right to modify above mentioned planned activities as well as proposed timeframes at any time.

The RFP responses are due by **February 18, 2021**.

It is preferred that responses are submitted via email with completed appendices attached (A - Vendor Response Template; B - Business Requirements; C - Total cost of ownership).

Questions regarding the RFP document and response template should be directed to:

Contact:	Inayatullah Naseebi
Address:	House No # 21, Main Street Shahr-e-Naw Shaheed Square, PD 10, Kabul
Email:	<a href="mailto:inayatullah.naseebi@finca.af">inayatullah.naseebi@finca.af</a>
Mobile:	+93791153869

**The End.**