REQUESTS FOR PROPOSALS (RFP)

RFP NUMBER: 02/2025

RFP DESCRIPTION:

CLOUD-BASED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM WITH LIVE CHAT, GENERATIVE AI-POWERED CHATBOT, AND CASE MANAGEMENT CAPABILITIES FOR A SERVICE-RENDERING ORGANISATION FOR A PERIOD OF FIVE (5) YEARS

CLOSING DATE: 27 JUNE 2025; TIME: 15:00

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CLOUD-BASED CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM WITH LIVE CHAT, GENERATIVE AI-POWERED CHATBOT AND CASE MANAGEMENT CAPABILITIES FOR A SERVICE-RENDERING ORGANISATION FOR A PERIOD OF FIVE (5) YEARS

The South African Pharmacy Council (SAPC) is a regulatory authority established in terms of the Pharmacy Act, 53 of 1974, with two offices in Arcadia and Hatfield, Pretoria. The SAPC hereby invites reputable, qualified service providers to provide a CRM system with live chat, generative AI-powered chatbot, case and workflow management, omnichannel and business application integration capabilities for a period of five (5) years.

A compulsory briefing session will be held virtually via Microsoft Teams on 05 June 2025 (09h00-11h00). Login details of the briefing session and RFP documents are on the Tender Page found on our website (https://www.sapc.za.org/tenders)

The SAPC subscribes to the Department of Trade, Industry and Competition's (DTIC) B-BBEE Balanced Scorecard for the accreditation of all proposals, in accordance with the latest DTIC Codes of Good Practice.

Proposals should be submitted in soft copy to Ms Refilwe Mutlane at tenders@sapc.za.org, or on a USB stick in a sealed envelope at the SAPC Building, 591 Belvedere Street, Arcadia, 0083.

The SAPC is not bound to accept any tender and reserves the right to cancel, withdraw, or decline services/tenders in respect of the tenders received and to re-advertise at its sole discretion.

The due date for submission of all documents is 27 June 2025

If you have fail to submit the required documents by the closing date, your proposal will be unsuccessful. No company will be allowed to submit documents after the closing date.

1. INTRODUCTION

The South African Pharmacy Council (SAPC) is a regulatory health authority established in terms of the Pharmacy Act, 53 of 1974, with offices in Pretoria (Arcadia and Hatfield). The SAPC hereby invites suitably qualified service providers to provide a Customer Relationship Management (CRM) system with live chat, generative AI-powered chatbot, case and workflow management, as well as omnichannel and business application integration capabilities for a service-rendering organisation for a period of five (5) years.

2. PROJECT PURPOSE

The SAPC wishes to appoint a suitable service provider on a 5-year contract to provide a Customer Relationship Management (CRM) system with live chat, generative AI-powered chatbot, case and workflow management, as well as omnichannel and business application integration capabilities for a service-rendering organisation.

3. SAPC BACKGROUND

The SAPC is an independent statutory health council established by the Legislature in recognition of the pharmacy profession as an exclusive occupational group, and to regulate such profession. The SAPC is responsible for its own funding.

In terms of Section 3 of the Pharmacy Act, 53 of 1974, the objectives are –

(a)   To assist in the promotion of the health of the population of South Africa;

(b)   To advise the Minister of Health or any other person on any matter relating to pharmacy;

(c)   To promote the provision of pharmaceutical care which complies with universal norms and values, in both the public and private sectors, with the goal of achieving definite therapeutic outcomes for the health and quality of life of South Africans;

(d)   To uphold and safeguard the rights of the general public to universally acceptable standards of pharmacy practice in both the public and private sectors;

(e)   To establish, develop, maintain and control universally acceptable standards:

   (i)   in pharmaceutical education and training;
   (ii)   for the registration of a person who provides one or more or all of the services which form part of the scope of practice of the category in which such person is registered;
   (iii)   of the practice of the various categories of persons required to be registered in terms of the Act;
   (iv)   of professional conduct required of persons to be registered in terms of the Act;
   (v)   of control over persons registered in terms of the Act by investigating, in accordance with the Act, complaints or accusations relating to the conduct of registered persons.

(f) To promote transparency to the profession and the general public in line with good corporate governance principles;

(g) To maintain and enhance the dignity of the pharmacy profession.

4. PURPOSE OF THE TERMS OF REFERENCE

It is the intention of the SAPC to enter into a formal Service Level Agreement (SLA) with the successful Service Provider to provide the services described hereunder.

The specification would serve to guide the process of selecting and appointing a qualified service provider by ensuring a match between SAPC's requirements and the knowledge and experience of the service provider.

The specification and the service provider's proposal will form the basis of the service level agreement to be entered into between the parties.

5. CURRENT ENVIRONMENT

The operating technological environment may change from time to time according to evolving operational business requirements. Therefore, it is imperative that the proposed solution is designed to be scalable and flexible enough to seamlessly accommodate such changes.

5.1 The bidder is required to consider the following while scoping the proposal with regard to the existing environment for the solution.

SAPC IT Environment	SAPC IT Environment Details	
Microsoft Licensing	• **Microsoft 365 Education Plan**	SharePoint/OneDrive, Office, Microsoft Teams, Intune, Power BI, Defender
Main Business Applications	• Interaction Manager/Dashboard	Case Management & Workflow System.
	• Sage 300 (Accpac)	ERP, Financial Management System.
	• Crystal Reports	FMS Reporting.
	• Register System	C# SQL-based membership system.
	• eWorkflow System – SCM	BPM, Procurement workflow system.
	• Insight Reports	Financial Reporting.
	•	
	• Active Directory	Domain & User Accounts Admin.
	• Norming Asset	Asset management.
	• SAGE 300 People: HR Automation, Staffing and Payroll system	HR, Payroll and ESS Performance Management
	• Contact Centre: Enterprise (CCE) CRM	Customer/Company Interactions

SAPC IT Environment	SAPC IT Environment Details	
	• 3CX	Hosted PBX/Telephony/Call Centre Wallboard real-time updates of incoming calls
Telephony	Hosted 3CX PBX & Call Centre	
Existing Connectivity and Sizes	Mainline: iConnect (1000Mbps) Failover: Telkom Fibre (1000Mbps) APN: Vodacom Line (APN) (2Mbps)	
Number of offices and Total number of users	There are two offices, Arcadia (Main) and Hatfield (satellite office) connected via a dedicated fibre. Total number of users as per Active Directory: 320, Actual users: 115	

5.2 Point-to-Point connectivity between the main office (Arcadia) and the satellite Hatfield office.
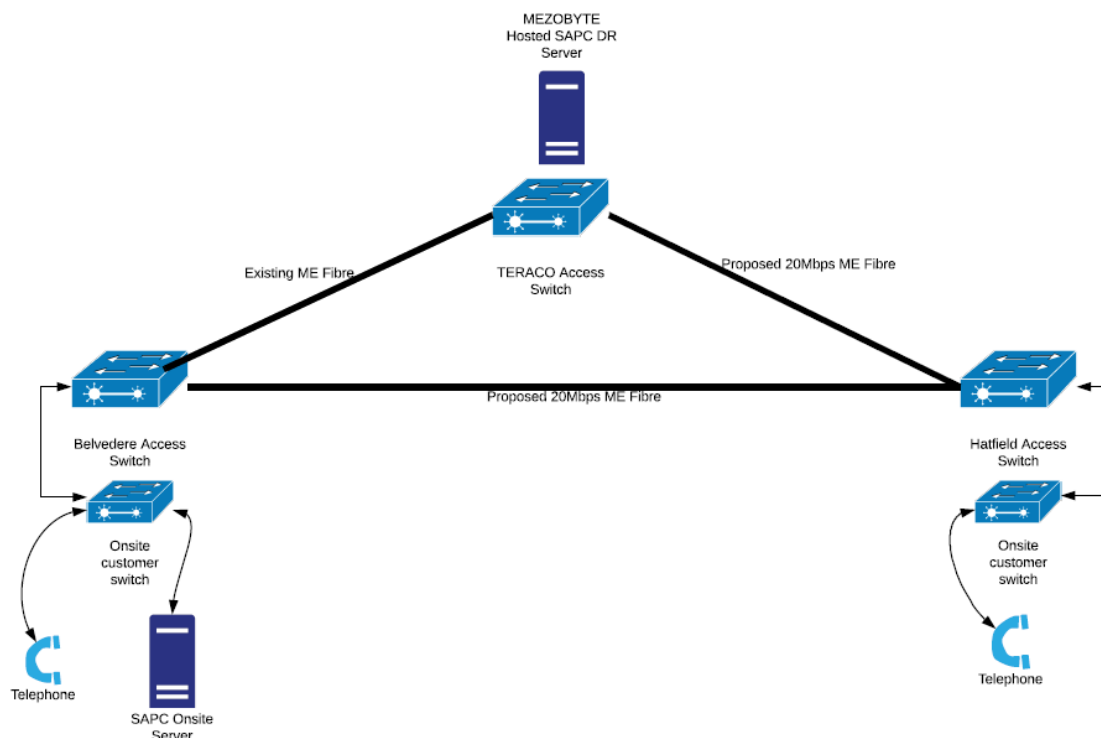
6. SCOPE OF WORK AND DELIVERABLES

6.1 CRM system with Live Chat, Gen. AI-powered chatbot, omnichannel and business application integration, and case management capabilities

The SAPC requires a solution that interoperates with our existing systems, to enable us to leverage contextual data to orchestrate a seamless customer journey, from entry to exit, by means of:

(a) Manage all communication channels, interactions, and work items on an Omnichannel CRM platform with embedded VOIP functionality to ensure a seamless customer journey to all registered persons, organisations, and members of the public interacting with Council;

(b) The proposed solution should offer the most relevant and reliable Artificial Intelligence (AI) including automation, and digital technologies;

(c) Centralise customer data across different channels, or points of contact, between the customer and Council, including:

   (i)   SMS;

   (ii)   Web Chat;

   (iii) Chat Bots;

   (iv)   Walk-in customers;

   (v)   Telephone (voice);

   (vi)   Web queries;

   (vii) Registration or applications;

   (viii) Social media platforms such as LinkedIn, WhatsApp, Facebook, TikTok, Instagram and X;

   (ix)   Emails;

   (x)   Mobile app interactions;

   (xi)   Feedback forms and surveys;

   (xii) Online portals and accounts;

   (xiii) Online discussions;

   (xiv) Events and workshops; and

   (xv)   Customer service tickets and support systems.

(d) Catering for a **two-tier contact centre structure**, with the **first tier** being the contact centre **(17 licenses)** directly responding to all contacts, and the **second tier (90 licenses)** being the second line support team interacting with escalated interactions from the first line. The second tier should also be able to provide first-tier support.

(e) Automated email facility with queuing and Service Level Management (SLM) functionality to ensure effective and stringent contact centre management reporting.

(f) The ability to pop-up client details from Caller Line Identification (CLI) in a single desktop platform that works with the CRM applications and controls all interactions and work items to enable first and second-tier support to provide consistent, contextual customer service.

(g) Logging queries, managing and monitoring client interactions, history of interactions, analysing (trends, demographics, case types, timeframes, allocated users, etc.), recording (capturing) direct and indirect interactions with customers and reporting on all interactions as well as escalated enquiries (speed desk) and activities relating to clients and productivity.

(h) Auditing trails, routing history of every incoming query, reporting who received it, who resolved it, timeframes in terms of SOP etc., from entry interaction to exit interaction.

(i) Chatbots on various SAPC systems such as mobile applications, website, register system and in all social media platforms such as LinkedIn, Facebook, Instagram, X, WhatsApp, etc. Chatbots used as a first-line support.

(j) Self-service capabilities built into the chatbots that are integrated with the various SAPC applications, website, mobile applications, and social media platforms.

(k) The system should avoid duplication of interaction/cases/tickets where the same matter has already been sent/resolved/escalated by the **first tier** and/or escalated to the **second tier**.

(l) Ensuring customisable reports are available as scheduled periodically (daily, weekly, monthly, etc) or on an ad hoc basis. Must also be able to display "as is" performance through a dashboard screen.

(m) Customising the system to suit SAPC requirements in ensuring query receiving, logging, management and reporting. The system should also be accessible from different types of devices at any given time and from any location.

(n) Provision should be made for data migration and accessibility of historical data.

(o) The system should be scalable by supporting future growth in users and data.

(p) The system should make provision for first-tier, second-tier, Management and Executive level customised CRM Dashboards.

The proposed CRM system should potentially integrate and interoperate with enterprise and custom-built applications. The CRM system should have open APIs (Application Programming Interfaces) or middleware integration platforms that allow for seamless integration with other systems.

The solution should allow seamless integration with third-party applications, including 3CX IP telephonic system, Accpac (Financial Management System), Interaction Manager Dashboard (Case Management System), Microsoft 365, and the Register System which is the main membership administration system.

6.2   CRM, LIVE CHAT AND CHATBOT SOLUTION ARCHITECTURE
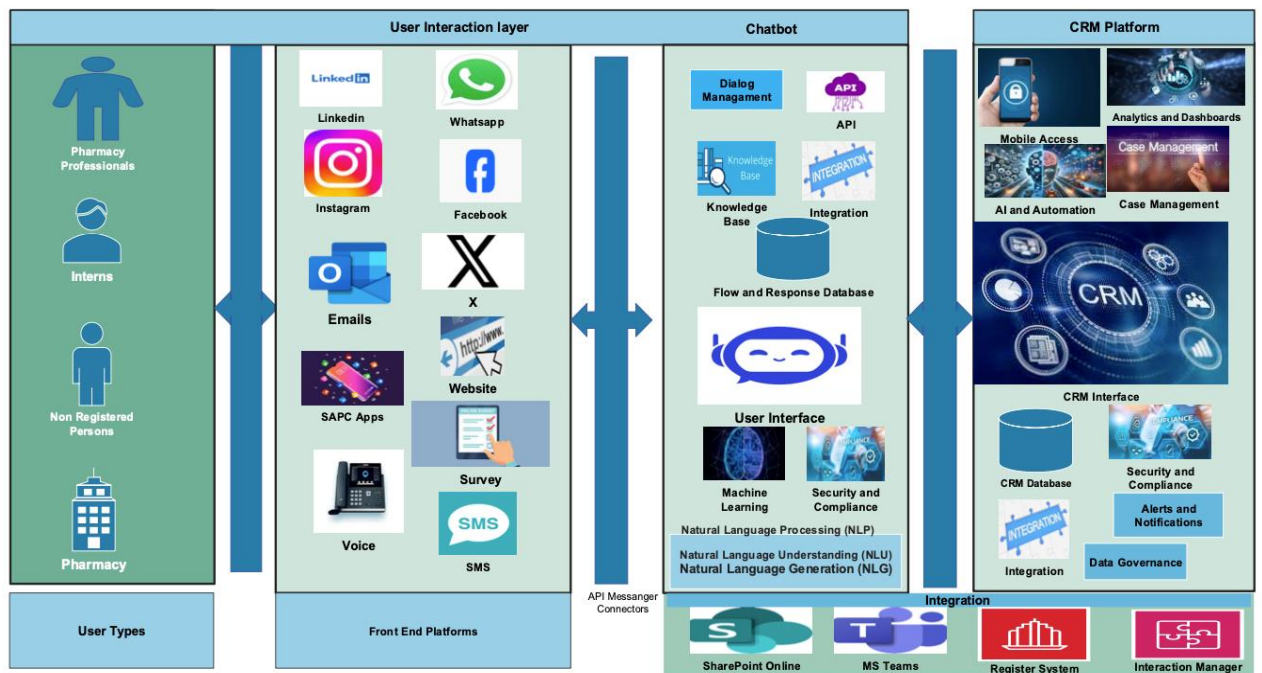
6.3 CRM, Live Chat and Chatbot Process Flow
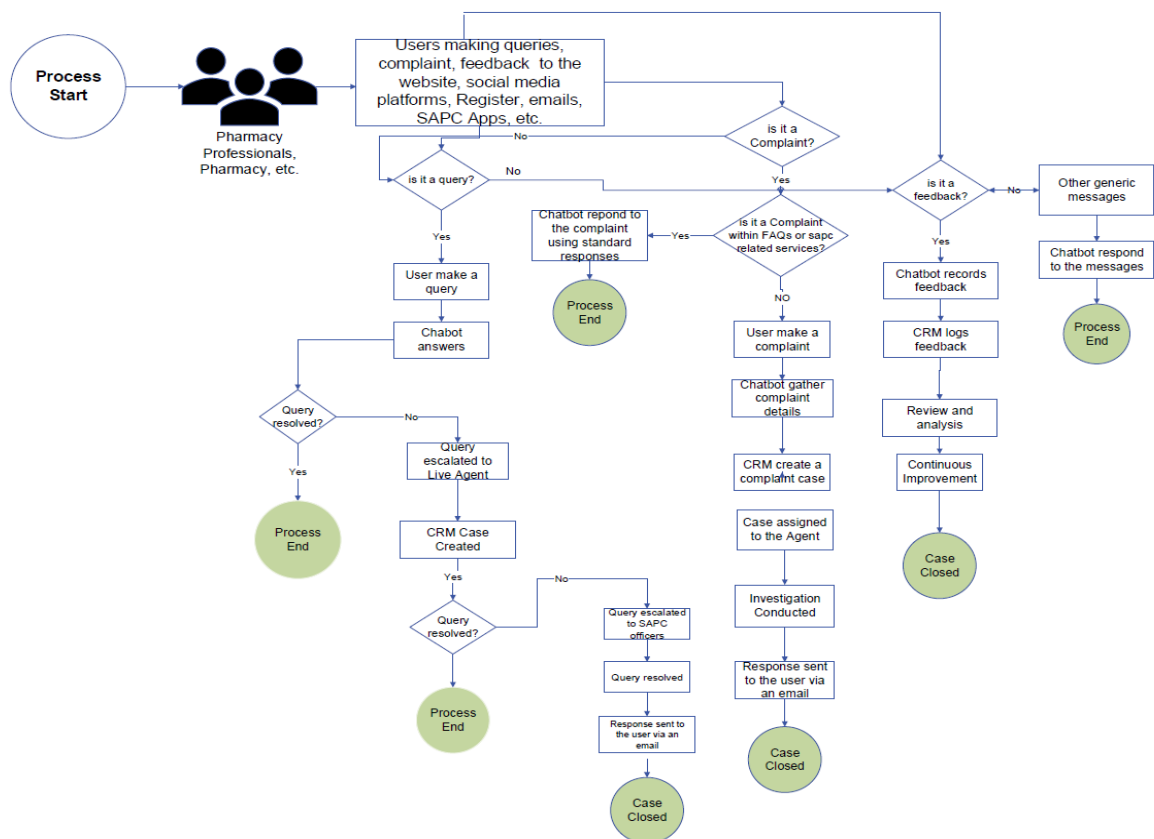
6.4 Process Flow for Self-Service Capabilities on the Chatbot

(a) Self-Service Process Flow

(b)   Self-Service Options

SELF SERVICE ON THE CHATBOT

Access
Letters and Certificates

Access Invoices

Access Statement

View
Account Balance

Access
Application Status

Access to
Login Details

Process and Allocate
Payment

7. FUNCTIONAL REQUIREMENTS

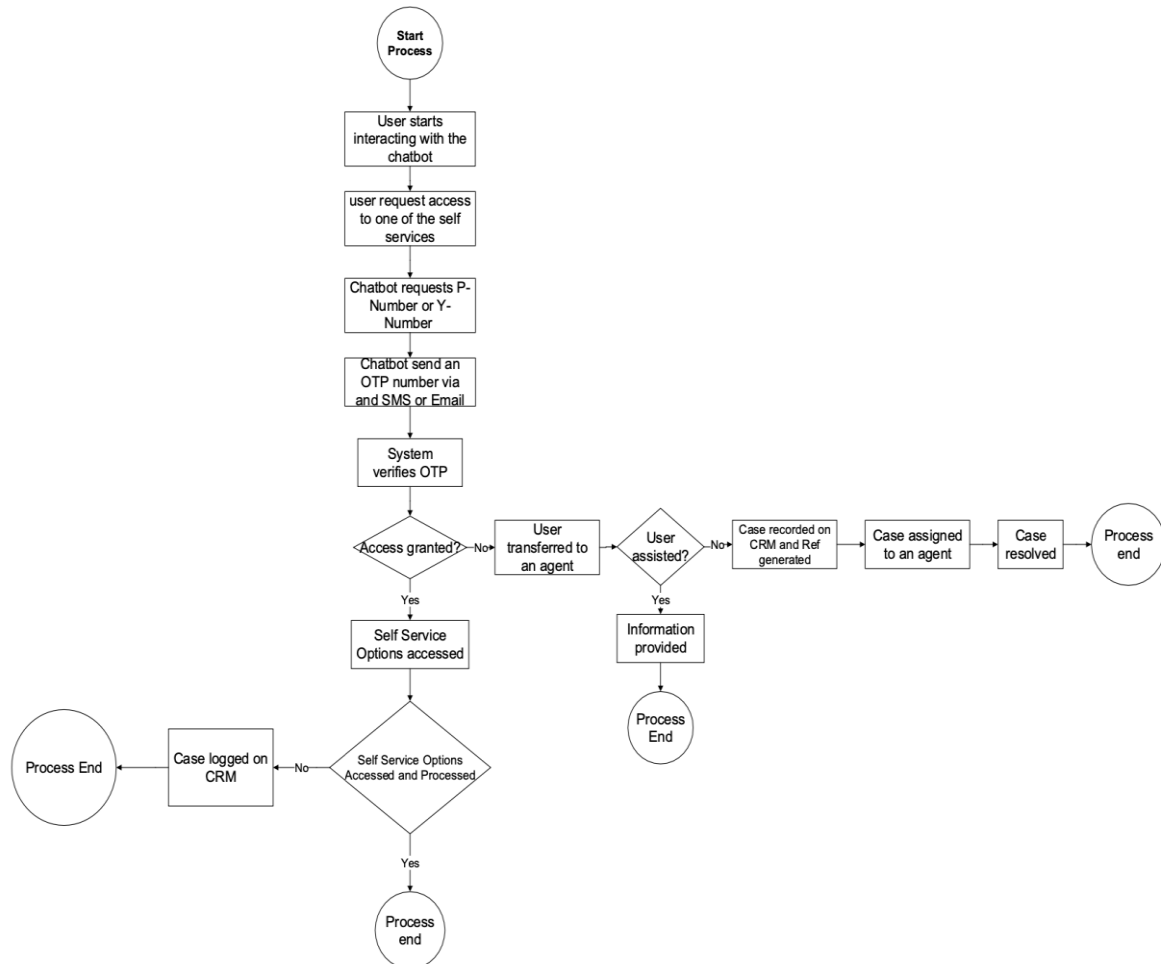7.1. The SAPC requires a Customer Relationship Management (CRM) system with live chat, generative AI-powered chatbot, case and workflow management, as well as omnichannel and business application integration capabilities in order to address the challenges of having multiple systems used for capturing, analysing and responding to customer interactions. The bidder is required to supply and configure a solution that meets the following functional requirements and specifications:

(a) A CRM solution with feedback and suggestion mechanisms.

(b) Chatbots built-in to the various SAPC systems, mobile applications, websites, etc.

(c) Self-service capabilities accessible using the chatbots built into the various SAPC applications, social media platforms, etc.

(d) CRM platform with generative AI and automation capabilities.

(e) Capabilities for reporting identified bugs on the solution.

(f) Performing auto escalation for identified cases that are not meeting the defined SLAs.

(g) Ensure omnichannel communication platform integration, encompassing social media, email and telephony.

(h) Providing real-time reporting and updates about the logged or closed cases.

(i) Providing the highest standard of user experience.

The essential requirements for the CRM, Live Chat and Chatbot tool with the case management system component, categorised by function, are as follows:

Category	Description
Bulk Responses	Capable of sending bulk emails, SMSs and bulk responses on app stores.
Third Party Integration	To integrate with the SAPC database, systems, third-party APIs, chatbots, etc.
Downtime and SLAs	No system downtime for the application or components. A backup and the DR system must be in place from day one.
Information Security	Put controls in place and ensure that the information systems security policy for SAPC is adhered to and ensure the information security of customer lists and their data in CRM systems.
System Integration	The solution should integrate with all the existing SAPC systems
Storage on Cloud	All data must be hosted on data centres residing within South African borders.
Exit Strategy	Exit strategy for the service provider in case SAPC plans to migrate the system in-house or use another cloud-based solution provider.

Category	Description
Data Encryption	Encryption of chatbot communication is vital. All personal data collected (e.g., Name, Mobile Number) needs to be encrypted/hashed as per regulation and global compliance practices.
Data Storage and Archive	The Bidder should explain where and how long chat-related information will be stored, how it will be used, and who will have access to it.
Prevention of Fraud	The Bidder should explain how to identify and intercept malicious chatbots deploying phishing schemes and social engineering hacks.
Other Requirements	CRM aligned with SAPC business processes, backup and recovery processes in place, Disaster Recovery and tests in place, merging duplicate contacts, integration with email clients, knowledge base, surveys, etc.
MIS Analysis	Analyse Management Information from the CRM platform.
Originating Channels (CRM)	Official Social media handles: Facebook, X, LinkedIn, YouTube (and non-owned chatter), Emails, WhatsApp, Walk-in, SAPC Websites, Public forums, blogs, review forums, etc.
Originating Channels (Live Chat, Chatbot)	Facebook Messenger, X messages, SAPC Website, Inspection App, Register App, WhatsApp, Support Email, Register System, etc.
Input Mode	Text, Audio, Images.
Input Capture	Real-time capture with no time lag.
Case or ticket Capture Accuracy	95% accuracy for the first two (2) months, then 100% accuracy expected.
Other Functions	Feedback mechanisms.
Ticketing Mechanism	Omni-channel ticketing solution, ticket classification, automatic assignment of tickets to specific teams, ticket routing rules, SLA and TAT escalations, etc.
Report Generation	Agent performance reports, reports on TAT, response quality, predictive analysis, SAPC queries and general query trends.
App Performance	Respond to App reviews.

7.2   CRM Tool

(a)   Client Servicing: The CRM should include a structured team for client and project management, with the necessary expertise to ensure the project's success and that SAPC achieves a return on investment.

(b)   Case and Ticketing: The system should allow for recording tickets or cases, capturing all relevant details either from the chatbot or agent and issuing a reference number. These cases or tickets will be tied to queries, complaints, or feedback received through various channels. Ability to identify a customer reaching out on multiple platforms.

(c)   Response Management: The CRM platform must ensure that agents promptly respond to all tickets created with the goal of resolving issues efficiently.

(d)   Workflow Management: The system should be able to route tickets to the appropriate stakeholders, as specified in sections 6.3 and 6.4.

(e)   SLA Definition and Tracking: The tool should support the establishment of Service Level Agreements (SLAs) ensuring that if tickets are not resolved within the agreed timeframe they are redirected according to the defined SLA. The SLA should also allow for performance tracking of the agents handling the tickets.

(f)   Escalation Procedure and Levels: The CRM system should be able to configure the escalation matrix as set by the SAPC. Use workflow engine with Auto Escalation mechanism.

(g)   Feedback Routing: Any feedback received through different platforms should be directed to the appropriate teams using the CRM tool.

(h)   Data Analysis: The system should analyse data to provide insights on complaints, feedback, queries, etc.

(i)   Dashboard Generation: The CRM should generate customised dashboards for various user types and departments.

(j)   Report Generation: The tool must be capable of generating reports on resource performance, customer satisfaction, response rates, turnaround times (TAT), Council-specific metrics, and issue identification.

(k)   Data-Driven Service Improvement: Insights gathered from data should be used to enhance the services provided to the public.

(l)   Reminder on pending tickets by e-mail to agents.

(m)   Integration: Integration with chatbots, Facebook Messenger, X, WhatsApp, mobile applications, websites, CRM platform, interaction manager, M365 applications, third-party modules, Instagram, register system, active directory, etc.

7.3   Live Chat and Chatbot Implementation

(a)   Functional Requirements

    (i)   First-Line Support: Provide instant answers to FAQs, troubleshoot common issues, and log support tickets.

    (ii)   Customer Support: Offer instant, round-the-clock assistance, enhancing engagement and satisfaction.

    (iii)   Self-Service: Enable SAPC stakeholders to access knowledge bases, manage accounts, make payment, access letters and certificates, access

login details, view account balance, access payment allocation, access statements, etc.

(iv) Ticket Management: Automatically log and track support tickets, routing them to the appropriate teams or agents.

(v) Repetitive Query Handling: Efficiently manage repetitive queries (e.g., product questions, complaints), providing 24/7, accurate responses to improve customer satisfaction.

(vi) Streamlined Communication: Ensure consistent messaging across multiple platforms (websites, apps, and social media).

(vii) Integration with Human Agents: Seamlessly escalate complex issues to human agents with context. Ability to integrate with Facebook Messenger, X, WhatsApp, mobile applications, websites, CRM platform, interaction manager, M365 applications, third-party modules, Instagram, register system, etc.

(viii) Have machine and deep learning capabilities.

(ix) Operational Efficiency: Automate routine tasks, freeing up staff for more complex work and reducing operational costs.

(x) Data Insights: Collect valuable user interaction data to improve services and personalise experiences.

(xi) Scalability: Handle high volumes of inquiries efficiently, adapting to growth and changing requirements.

(xii) Reduction of Manual Errors: Ensure consistent, error-free service, handling irate customers with professionalism, regardless of emotions.

(b) Platforms

The live chat and CRM should be able to integrate with the following channels.

(i) Different SAPC Websites

(ii) X.com

(iii) Inspection and Register Mobile applications

(iv) Whatsapp, Facebook Messenger, Instagram, LinkedIn, etc.

(v) Email

(vi) Register System and other SAPC Systems

(c)   Third-Party Integration

The chatbots implemented across all the platforms listed above must be capable of integrating with the following:

(i)   Register System

(ii)   All SAPC databases

(iii)   Microsoft 365 Applications

(iv)   Interaction Manager

(v)   PABX (3CX Telephony System)

(vi)   Any other tools and systems used by SAPC.

7.4   Platform for communication during the exams

The functional specifications for the platform used for communication during the exams are as follows:

a) Messages to be broadcast by the chief invigilator to all exam takers.
b) Invigilators to communicate with allocated exam takers prior to the exam.
c) The chief invigilator will monitor communication between invigilators and exam takers and respond to unattended queries.
d) A video call functionality to enable invigilators to assist exam takers remotely
e) Report on invigilator performance with respect to queries resolved and those unattended to
f) Report on where exam takers who experienced challenges are located within SA

8.   TECHNICAL REQUIREMENTS

The technical requirements of the CRM and Chatbot solution with case management capabilities are as follows:

Category	Requirements
Hardware Requirements	Cloud-based solution (SaaS / PaaS).
Client Software	Browser-based or smart client supporting Internet Explorer, Firefox, and Google Chrome.
Scalability & Integration	Supports clustering, failover, APIs for system and middleware integration.
Security & Administration	Remote admin, LDAP/SSO, encrypted passwords, audit trails, multi-level user access.
Disaster Recovery	No data loss, synchronized data across primary and recovery sites.
Backups	Ensure that backups for the CRM solution are conducted as per the SAPC backup procedure.
Architecture & Customisation	Open API, industry-standard tech platform, customisable tools, unified management.

Category	Requirements
Cloud & Data Security	Virtualisation, dynamic scaling, strong physical/network security, data encryption, etc.
Reporting & Analytics	Integrated reporting tool with customisable reports, CRM analytics, KPI tracking, pre-built dashboards.
Mobile & Language Support	Multi-device support (iOS, Android), multiple language support (English, regional languages).

9. OTHER INFORMATION RELATED TO SCOPE OF WORK

9.1 Project Plan

The kick-off meeting will be held with the successful Bidder after the bid is awarded, as per the outlined process. Following the meeting, the successful Bidder must submit a detailed project plan and requirements document. After the meeting, the Bidder must provide a detailed project plan and requirements document including key elements such as timelines for each implementation stage/milestones, technical and functional specifications of the CRM and Chatbot solutions, proposed hardware and software licenses, DR and backup solutions, project lifecycle details, and workflows. The document will be reviewed and signed off by the service provider and SAPC.

Failure by the successful bidder to submit the detailed plan and requirements documents on the kick off meeting, Council will have to terminate the contract.

9.2 Skills Transfer Plan

The successful bidder is responsible for organising all training sessions, including the end-user training and the technical training. The training will include software instructions on CRM tools, Chatbot solution, and related technologies. Additionally, an operations manual will be provided to the SAPC participants. The training schedule and course content will be finalised in coordination with SAPC.

9.3 Technical Support and Maintenance

The successful bidder shall provide second-line technical support and maintenance for a period of four years to address, analyse, and resolve any technical issues with the existing features using the SAPC change management policy. This support will begin after the successful go-live and the subsequent sign-off by both parties. The technical support scope includes fixing errors in the already developed solution. Any required changes will be handled through change requests. The Bidder will also provide a per-day cost for any new enhancements or change requests made by SAPC.

9.4 Project Team

The appointed bidder shall provide a technical team, and the project manager assigned to this project. The procedure to be followed for second-line technical support and maintenance shall be clearly specified on the SLA.

10. CONTRACT PERIOD

SAPC is looking to enter into a contract with a reputable company that provides an Integrated Cloud Based CRM and Chatbot with Case Management Capabilities solution for a period of five (5) years.

11. SERVICE PROVIDER ORGANISATION DUTIES AND RESPONSIBILITIES

The service provider will be required to fully comply with all requirements/deliverables as stipulated in section 6 of this document.

12. DESIRED CONFIDENTIALITY TERMS AND CONDITIONS

12.1 The successful service provider must strictly treat all SAPC information with a high degree of confidentiality.

12.2 The SAPC's information must not be provided to a third party by any means.

12.3 The successful service provider must be compliant with the requirements of the Protection of Personal Information Act 4 of 2013.

12.4 SAPC undertakes to maintain confidentiality relating to any unpublished information you supply to us as part of this RFP and will only use any information provided for the purposes of evaluating this RFP.

12.5 South African Pharmacy Council reserves the right:

(a) To negotiate with one or more preferred service provider(s) identified in the evaluation process, regarding any terms and conditions, including price, without offering the same opportunity to any other service provider (s) who has not been awarded the status of the preferred service provider;

(b) To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the service provider(s), whether before or after adjudication of the RFP;

(c) To correct any mistake at any stage of the RFP that may have been in the RFP documents or occurred at any stage of the RFP process; and

(d) To cancel and/or terminate the RFP process at any stage, including after the closing date and/or after presentations have been made, and/or after proposals have been evaluated, and/or after the preferred service provider has been notified of their status as such.

13. CONTENT OF THE PROPOSAL

The proposal must include the following:

(a) Company profile and relevant experience;

(b) BBBEE Rating scorecard;

(c) Valid tax compliance status certificate;

(d) Company registration documents;

(e) At least three contactable references;

(f) Risk Assessment Audit Form;

(g) Complete pricing/ costing; and

(h) Pricing must be inclusive of VAT.

Other important conditions:

(a) The prospective service provider/ firm is responsible for all costs incurred in preparing and submitting the proposal.

(b) By accepting to take part in the proposal process, you agree to keep all information shared with you in relation to the proposal process confidential, not to disclose it to third parties, and not to use it for purposes other than the proposal.

(c) The SAPC reserves the right not to award this contract.

(d) The SAPC reserves the right to disregard a firm's proposal should it be found that work was previously undertaken for the SAPC, for which poor performance was noted during the execution of such contract in the last five (5) years.

(e) Should the bidder present information intentionally incorrectly/fraudulently, their proposal will be disqualified.

(f) Prospective service providers are responsible for ensuring that their proposal is submitted before the closing date and time of the RFP and that the proposal is received by the SAPC.

14. ENQUIRIES AND SUBMISSION

(a) All enquiries must be made in writing and will be responded to during office hours 08:00 to 15:00, Monday to Friday.

Refilwe Mutlane	E-mail	tenders@sapc.za.org

(b) Proposals should be submitted by **27 June 2025 at 15:00** in soft copy format to tenders@sapc.za.org or on a USB in a sealed envelope at the SAPC Building, 591 Belvedere Street, Arcadia 0083.

(c) Proposals not meeting the submission requirements or submitted after the due date will be disqualified.

(d) If you do not hear from us within 90 days after the closing date, please accept that your proposal was unsuccessful.

15. EVALUATION OF PROPOSALS

(a) The SAPC will apply the principles of the Preferential Procurement Policy Framework Act, 5 of 2000 (PPPFA) to this proposal.

(b) The evaluation of the proposals will be based on the 90/10 PPPFA principle and will be done in three (3) phases, namely-

  (i) Pre-qualifications.

  (ii) Functionality.

(iii) Pricing.

(iv) BBBEE.

(c) Phase 1- Pre-qualification Evaluation

Proposals will be disqualified or excluded by the Adjudicating Committee under any of the conditions listed below:

(i) Submission after the deadline.

(ii) Proposals submitted at an incorrect location.

(iii) Proposals submitted in the wrong format, other than via email or soft copy on a USB dropped at the designated location per Paragraph 14 (b) above.

(iv) Service providers whose tax matters/ statuses are not in good standing with the South African Revenue Service (SARS).

(v) Proposal not fully completed.

(vi) BBBEE Original Certificate/ Affidavit (not older than three (3) Months) not submitted or an expired certificate is submitted.

(vii) No company registration documents and IDs of registered directors are submitted.

(d) Phase 2 - Technical Functional Requirements

(i) Eligible service providers will be invited to do a presentation outlining the major milestones of the project, including the functional and technical requirements of the CRM and Chatbot solution.

(ii) The functionality score is allocated 27 points (30% of 90). To qualify for Phase 3 evaluation, a minimum score of 70% on functionality will be required.

(iii) A form will be used to evaluate proposals by members of the Tender Committee, and thereafter, the committee's average/aggregate score will be calculated.

(e) Phase 3: Pricing and Black Economic Empowerment (BEE)

(i) Bid Costing Model

Bidder shall adhere to and use the costing model as provided below for All pricing – unless otherwise indicated – must be provided in ZAR.

The table below lists the details of the milestones and deliverables required per phase and is provided for reference purposes while completing the costing:

Phase (Total maximum duration 5 years):	Milestones and Deliverables
Phase 1 – Programme Engagement & Scoping • Project Kick-Off Meeting • Scoping and assessment • Initial Risk Assessment • Implementation Plan (Project Plan and Charter) • Develop the Skills Transfer Plan	• Scoping and assessment • Develop the Skills Transfer Plan • Project Plan and the Project Charter • Risk Register
Phase 2: CRM Configuration and Implementation	• Requirements gathering, technical specifications and architectural design. • Implement a cloud-based CRM solution, configure user permissions, and customise modules. • CRM Platform Licensing (NB: SAPC is using the Education Plan for Microsoft Licensing). • User Configuration and Customisation • Data Import & Migration • Integration with other systems (Interaction Manager, M365 Applications, PABX system, etc.) • Testing & Optimisation • Implement the skills transfer plan for phase 2 • Phase 2 Sign-Off
Phase 3 – Chatbot Development and Integration	• Requirements gathering, technical specifications and architectural design. • Chatbot Licensing and Platform Setup (NB: SAPC is using the Education Plan for Microsoft Licensing). • Chatbot Development (flows, automation, responses) • CRM and Case Management Integration • Integration with WhatsApp, Websites, Facebook Messenger, X.com (Twitter), mobile Apps, SAPC Applications, Instagram, etc. • Build Self-service capabilities for accessing various identified services using the chatbot

Phase (Total maximum duration 5 years):	Milestones and Deliverables
	• Testing & Optimisation • Implement the skills transfer plan for phase 3 • Phase 3 Sign-Off
Phase 4: Case Management System (CMS) Implementation	• Requirements gathering, technical specifications and architectural design. • CMS Platform Licensing (NB: SAPC is using the Education Plan for Microsoft Licensing). • Case Workflow Customisation • SLA Setup & Notification System and all the other features • Integration with all the identified systems • Testing & Optimisation • Implement the skills transfer plan for phase 4 • Phase 4 Sign-Off
Phase 5: Dashboards and Reporting	• Requirements gathering, technical specifications and architectural design. • Dashboard requirements document, wireframes/mock-ups, sign-off • Data integration plan, report templates, first dashboard version • Customised dashboards, UAT feedback reports, bug fixes • Implement the skills transfer plan for phase 5 • Phase 5 Sign-Off

Phase (Total maximum duration 5 years):	Milestones and Deliverables
Phase 6: Testing, Quality Assurance, and Launch	• Testing (functionality, integration, load) • Bug Fixes, Adjustments and Optimisation • Final Go-Live Support • Project Close Off Meeting and Sign-off
Phase 7: Ongoing Support & Maintenance	• Provide ongoing support and maintenance for CRM, chatbot, and case management systems after launch. • Provide a procedure for logging second-line support and maintenance calls. • Monthly technical support and maintenance • Hold SLA monthly meetings if a need arises and also produce SLA Monthly reports • Feature Upgrades (if applicable) • Technical Support

(ii) A maximum of 63 points is allocated for price on the following basis/ formula.

$$Ps = 90\left(1 - \frac{Pt - P\min}{P\min}\right)$$

Where -

Ps = Points scored for price of bid under consideration

Pt = Rand value of bid under consideration

Pmin = Rand value of the lowest acceptable bid

(iii) A maximum of 10 points is allocated to BBBEE on the following sliding scale.

BBBEE Status	BBBEE Scorecard rating	BBBEE Points
Level 1Contributor	100 Points and above	10
Level 2 Contributor	Between 85 and 100 points	9
Level 3 Contributor	Between 75 and 85 points	8
Level 4 Contributor	Between 65 and 75 points	5
Level 5 Contributor	Between 55 and 65 points	4
Level 6 Contributor	Between 45 and 55 points	3
Level 7 Contributor	Between 40 and 45 points	2
Level 8 Contributor	Between 30 and 40 points	1
Non-Compliant Contributor	Less than 30	0

(iv) The overall aggregate score for firms qualifying for consideration at Phase 3 evaluation will be used to recommend appointment to the Executive Committee of SAPC.

Description	Maximum points
Functionality	27
Pricing	63
BBBEE	10
Total Points	100

ANNEXURE A: PRICING/COSTING SCHEDULE

COMPANY DETAILS	
Name of firm/service provider	
Representative/contact person	
Contact details	
Telephone/Mobile	
E-mail address	
PROJECT MILESTONES AND RATES APPLICABLE	
Description	**Amount (VAT Inclusive)**
Phase 1 – Programme Engagement & Scoping	
Phase 2: CRM Configuration and Implementation	
Phase 3 – Chatbot, Live Chat Development and Integration	
Phase 4: Case and Workflow Management System (CMS) Implementation	
Phase 5: Dashboards and Reporting, and Implementation	
Phase 6: Testing, Quality Assurance, and Launch	
Phase 7: Ongoing Support & Maintenance for 48 months	
Others	
Total cost	

Notes:

1. The costing schedule is to be submitted as part of the proposal.

2. Proposals without full pricing/total costing will be regarded as non-compliant.

ANNEXURE B – EVALUATION SHEET

NAME OF MEMBER:

SCORECARD FOR EVALUATION OF THE PROPOSALS FOR THE CRM AND CHATBOT SOLUTION WITH CASE MANAGEMENT CAPABILITIES

THE 90/10 PREFERENCE POINT SYSTEM

NAME OF COMPANY:

A maximum of 90 points is allocated for functionality and price on the following basis: **90/10**

Price evaluation criteria = 63 points (70% of 90)

$$Ps = 90\left(1 - \frac{Pt - P\min}{P\min}\right)$$

Where-

Ps = Points scored for the price of a bid under consideration

Pt = Rand value of bid under consideration

Pmin = Rand value of the lowest acceptable bid

Total Points for pricing (70% of 90 = 63 points)   _____

Functional Evaluation Criteria = 27 points (30% of 90)

The full scope of requirements will be determined by the following weights:

No.	Technical Functionality requirements	Weighting
	Part A: Technical functional evaluation	17
1.	Bidder certification and affiliation requirements	1
2.	Project Management/or Methodology	2
3.	CRM, AI-anchored live chat/web chat, and chatbot Solution with the case management system	3
4.	Detailed Design and Architecture Proposal	2
5.	Bidder experience and capability requirements	2
6.	Knowledge and Expertise	2

7.	Support and Maintenance of the CRM and Chatbot Solution with Case Management System	2
8.	Skills Transfer and Training Requirements	3
Part B: Presentation		10
2.	Solution proposed with architecture, functional and technical requirements	2
3.	Case studies of live CRM, AI-anchored live chat/web chat, and chatbot Solution with the case management system	2
4.	Demo of live chatbots and artificial Intelligence and automation capabilities	2
5.	Accuracy of responses of chatbots and resources	2
6.	Case Management and Integration	2
TOTAL		**27**

The technical functional evaluation criteria is as follows:

TECHNICAL FUNCTIONALITY REQUIREMENTS	*Substantiating evidence and Scoring Matrix Criteria (used to evaluate bid)*	*Total Points*	*Score*
1. Bidder certification / Affiliation Requirements The bidder must be accredited and certified with an OEM/OSM (Gold Partner and above) to host, develop and implement a CRM and Chatbot with Case Management Capabilities including maintenance and support.	Attach a copy of valid OEM/OSM documentation (Certificate or letter) to develop and implement a CRM and Chatbot with Case Management Capabilities including maintenance and support. **Note:** SAPC reserves the right to verify the information provided. 0-Copy of valid OEM/OSM not submitted 1-Copy of valid OEM/OSM submitted	1	
2. Project Plan and Methodology The bidder must provide a detailed project plan for rolling out the CRM and chatbot solution with a case management system, addressing all the key deliverables in accordance with the stipulated timeframe of 60 months. The plan must include activities, milestones, resources, and timeframes. For the project plan to be valid, it must follow the timelines of 60 months. The project plan should include the following key factors: • Detailed project definition and planning. • Detailed Project implementation plan with timeframes, stages and reportable milestones • Detailed pricing for the project • Detailed resource allocation • Detail timelines	**Evidence:** Detailed project plan and the method used **Evaluation:** 0= No submission or submitted but do not meet the requirements 1= Partially tailored approach, meets most needs 2= Innovative, tailored approach meeting/exceeding project needs	2	
3. CRM, AI-anchored live chat/web chat, and chatbot Solution with the case management system	**Evidence:** Full supporting details to be provided as required above	3	

	TECHNICAL FUNCTIONALITY REQUIREMENTS	Substantiating evidence and Scoring Matrix Criteria *(used to evaluate bid)*	Total Points	Score
	The bidder to provide information concerning the following key factors: • Details of technical infrastructure to be used for this solution • Details of how the CRM and Chatbot solution meets or exceeds the requirements. • Details of how the case management system meets or exceeds the requirements. • CRM and Chatbot solution with case management system supports the latest technologies (Artificial Intelligence, APIs, Cloud Computing, Business Intelligence, automation, etc.)	**Evaluation:** 0-No or irrelevant information provided 1-2-All information with all the listed key factors provided. 3-All information with key factors provided with additional factors		
4.	Detailed Design and Architecture Proposal The Bidder must provide detailed documents and schematic diagrams showing the solution design including the software and hardware for the proposed solution that meets SAPC's requirements. The documents must include, amongst others the following aspects: • Conceptual design • High-level design • Detailed technical specifications • Migration/Transition strategy	**Evaluation:** Detailed design and architectural proposal for the infrastructure upgrade 0= No aspect designed 1= Conceptual design, high-level design and detailed technical specifications 2= Conceptual design, high-level design, detailed technical specifications and migration /transition	2	
5.	Bidder experience and capability requirements The bidder must have developed and maintained the CRM and Chatbot solution with case management including maintenance and support to at least three (3) customers in the last five years.	Evidence: Provide at least three (3) customers to whom the supply and development of a CRM, Chatbot and case management including maintenance and support were delivered. NB: SAPC reserves the right to verify the information provided No/incomplete reference letters points 2= 3 relevant reference letters	2	
6.	Knowledge and Expertise The bidders must provide the CRM specialist CVs and certified qualifications outlining their experience and capabilities in executing similar projects.	Evaluation: 0= No CV or having CV and No relevant certifications 1= CV with few years of experience and certifications 2=CV with five (5) years' experience, certification and IT degree or equivalent	2	

TECHNICAL FUNCTIONALITY REQUIREMENTS	Substantiating evidence and Scoring Matrix Criteria *(used to evaluate bid)*	Total Points	Score
7. Support and Maintenance of the CRM and Chatbot Solution with a Case Management System The bidder must describe the process and mechanisms for handling inquiries and reported and reported problems.	**Evidence:** Full supporting details to be provided as required. **Evaluation:** 0=No evidence/does not comply 1=Bidder has provided evidence of documented incident management methodologies 2= Bidder has documented incident management processes, implemented incident management tools, and managed escalation and incident resolution process	2	
8. Skills Transfer and Training Requirements The bidder shall include Consulting and Training Services as part of the CRM and Chatbot solution with case management capabilities. In support of this requirement, the bidder is required to describe the training and on-site support services they shall make available to operationally assist when the services are in place as well as to address any service limitations.	**Evaluation:** 0=No evidence/does not comply 1=Only a training curriculum outline provided 2=Training curriculum clearly details course prerequisites and outcomes 3= Training Plan, Training curriculum details prerequisites, outcomes and is mapped to operational roles required to manage an installation of this size and complexity	3	

Total points for functionality (30% of 90 = 27 points)   _____

Sub-total points for pricing and functionality	

Points awarded for Compliance with the BBBEE Scorecard

A company's score is translated into a level. The higher the level, the more that preferential procurement is worth. The table below represents the levels of compliance:

BBBEE Status	BBBEE Scorecard rating	BBBEE Points
Level 1 Contributor	100 Points and above	10
Level 2 Contributor	Between 85 and 100 points	9
Level 3 Contributor	Between 75 and 85 points	8
Level 4 Contributor	Between 65 and 75 points	5
Level 5 Contributor	Between 55 and 65 points	4
Level 6 Contributor	Between 45 and 55 points	3
Level 7 Contributor	Between 40 and 45 points	2
Level 8 Contributor	Between 30 and 40 points	1
Non-Compliant Contributor	Less than 30	0