

REQUESTS FOR PROPOSALS (RFP)

RFP NUMBER: 04/2025

RFP DESCRIPTION:

**IMPLEMENTATION OF MICROSOFT DYNAMICS 365 CUSTOMER
SERVICE AS A CUSTOMER RELATIONSHIP MANAGEMENT
(CRM) SYSTEM FOR THE SOUTH AFRICAN PHARMACY
COUNCIL**

CLOSING DATE: 21 October 2025; TIME: 15:00

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IMPLEMENTATION OF MICROSOFT DYNAMICS 365 CUSTOMER SERVICE AS A CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM FOR THE SOUTH AFRICAN PHARMACY COUNCIL

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, who are Microsoft-certified partners/professionals with a record of implementing Microsoft Dynamics 365 as a CRM, to implement the Microsoft Dynamics 365 CRM system, with Microsoft Copilot Generative AI Chatbot/Virtual Agent, and ensure the following integrations: Contact/Call Centre Telephony System (currently 3CX), Outlook mailbox, Omnichannel (Social Media, WhatsApp), member database system, in-house case management system, and SAGE Accpac (for account balance queries).

The successful bidder will also be expected to provide 12 months' support, onboarding and technical training.

A compulsory briefing session will be held virtually via Microsoft Teams on 09 October 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 21 October 2025

If you 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 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, who are Microsoft-certified partners/professionals with a record of implementing Microsoft Dynamics 365 as a CRM, to implement the Microsoft Dynamics 365 CRM system, with Microsoft Copilot AI Chatbot/Virtual Agent, and ensure the following integrations: Contact/Call Centre Telephony System (currently 3CX), Outlook mailbox, Omnichannel (Social Media, WhatsApp), member database system, in-house case management system, and SAGE Accpac (for account balance queries).

2. PROJECT PURPOSE

The SAPC wishes to appoint a reputable, qualified service providers, who are Microsoft-certified partners/professionals with a record of implementing Microsoft Dynamics 365 as a CRM, to implement the Microsoft Dynamics 365 CRM system, with Microsoft Copilot AI Chatbot/Virtual Agent, and ensure the following integrations: Contact/Call Centre Telephony System (currently 3CX), Outlook mailbox, Omnichannel (Social Media, WhatsApp), member database system, in-house case management system, and SAGE Accpac (for account balance queries).

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.

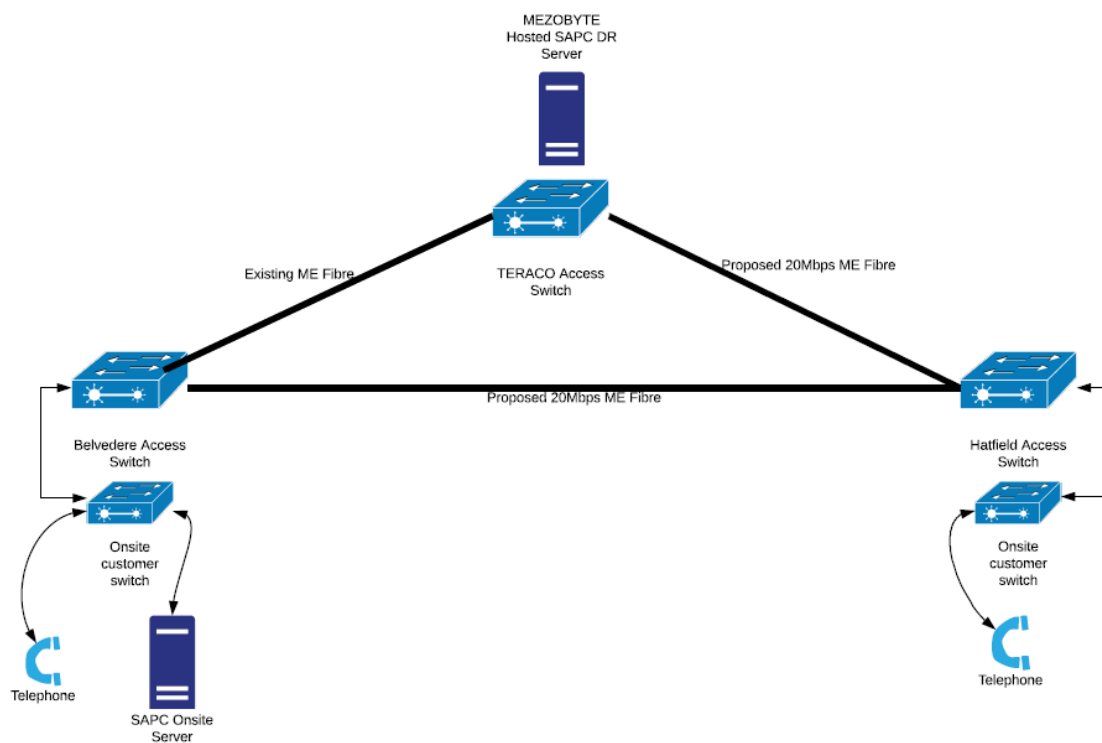
5. CURRENT ENVIRONMENT

- 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.
	Register System	C# SQL-based member database system.
	Active Directory	Domain & User Accounts Admin.
	3CX	Hosted PBX/Telephony/Call Centre Wallboard real-time updates of incoming calls, including call surveys and reporting on individual agent and the organisation's service delivery.
Telephony	Hosted 3CX PBX & Call Centre	
Customer Care Email CRM	Enghouse Interactive Touchpoint – including email surveys and reporting on individual agents and the	To be discontinued on successful implementation of D365 -

SAPC IT Environment	SAPC IT Environment Details	
	organisation's service delivery.	data to be migrated to Dynamics 365
Existing Connectivity and Sizes	Mainline: iConnect (1000Mbps) Failover: Telkom Fibre (1000Mbps) APN: Vodacom Line (APN) (2Mbps)	
Total number of users	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

The SAPC requires the implementation of Microsoft Dynamics 365 that interoperates with our existing systems, to enable us to leverage contextual data to orchestrate a seamless customer journey, from entry to exit.

The following should be noted by bidders:

- All third-party APIs (e.g., 3CX, WhatsApp, AccPac) are accessible.
- In-house system (Member Database/"Register System") exposes secure APIs and/or allows middleware access.
- No custom plugin development is required beyond supported Dynamics 365 extensions.
- The SAPC will cover any middleware costs; however, the bidder will be responsible for implementing the solution and ensuring functional operation throughout the contract.

6.1.1 CRM Implementation

Microsoft Dynamics 365 Customer Service

- Modules: Case Management, Omnichannel for Customer Service, Customer Insights.
- Licensing: Omnichannel Add-on required for social media and WhatsApp integration.

Microsoft Copilot (AI Chatbot)

- Embedded Copilot in Dynamics 365 for agent assistance.
- Power Virtual Agents (PVA) for a customer-facing chatbot.
- AI Builder for natural language understanding and automation.

6.1.2 Communication Channel Integrations

Contact/Call Centre

- Integration: 3CX Contact Centre via 3CX API for CRM.
- Features: Caller ID to Contact Name, Call & Chat Journalling, Click to Call, Contact Lookup.

Outlook Mailbox

- Integration: Microsoft Exchange Online connector.
- Functionality: Automatically convert emails to cases or route to queues.

Social Media Channels

- Platforms: Facebook, Twitter/X.com, Instagram (via Omnichannel).
- Functionality: Monitor, respond, and convert messages into cases.

WhatsApp

- Integration: Via Omnichannel for Customer Service using Twilio or Telesign as WhatsApp Business API providers.
- Registration: Register WhatsApp number on behalf of SAPC.
- Functionality: Two-way messaging, case creation, chatbot handoff.

Gen. AI-powered Chatbot (Copilot + Power Virtual Agents)

- Platform: Power Virtual Agents with Copilot capabilities.
- Channels: Embedded on website, WhatsApp, and social media.
- Capabilities:
 - o Answer FAQs
 - o Check case status (via API to case management system)
 - o Provide account balances (via SAGE AccPac integration)
 - o Escalate to Live Chat with human agent in Dynamics 365

6.1.3 System Integrations

In-House Case Management System

- Integration Method: RESTful API or middleware (e.g., Azure Logic Apps or Power Automate).

- Use Case: Retrieve case status using case reference or customer ID.
- Security: OAuth 2.0 or API key-based authentication.

SAGE AccPac

- Integration Method: Web services or database-level integration via middleware.
- Use Case: Retrieve real-time account balances.
- Security: Secure API gateway or encrypted database access.

Member Lookup and Interaction History

- For incoming calls, the system captures the caller ID and searches the member database.
- For incoming emails, the sender's email address is used to retrieve member details.
- Member profile and interaction history are displayed to the agent.
- Implementation via Power Automate, Azure Functions, or embedded Canvas Apps.
- Secure access using Azure AD or API keys.

6.1.4 Data migration

The following data ought to be migrated prior to the go-live date:

- Database of all clients/registered persons with unique identification numbers (Y-number/P-number)
- Chat/interaction history from old email CRM (Enghouse Touchpoint)

6.1.5. Reporting

Ensure reporting capabilities for all interactions and monitoring of service level agreements (SLAs).

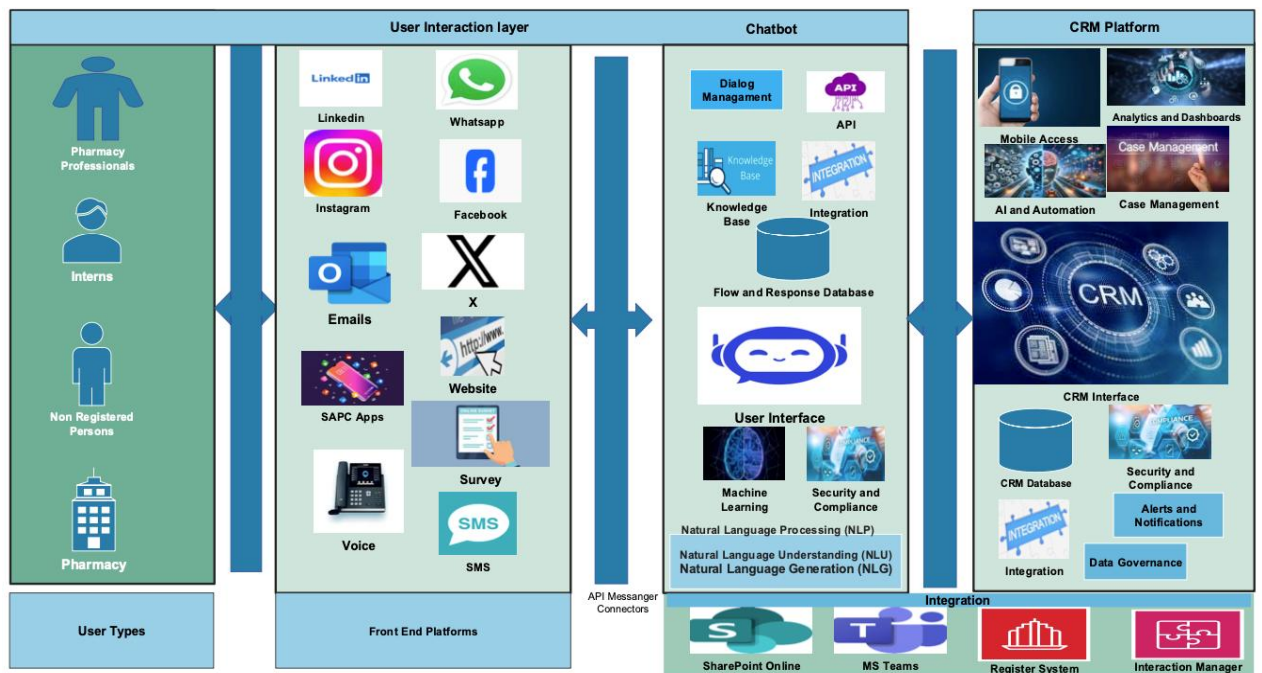
Provide Customer satisfaction rating reports via D365 Customer Voice surveys.

6.1.6 Interaction/Data Flow Overview

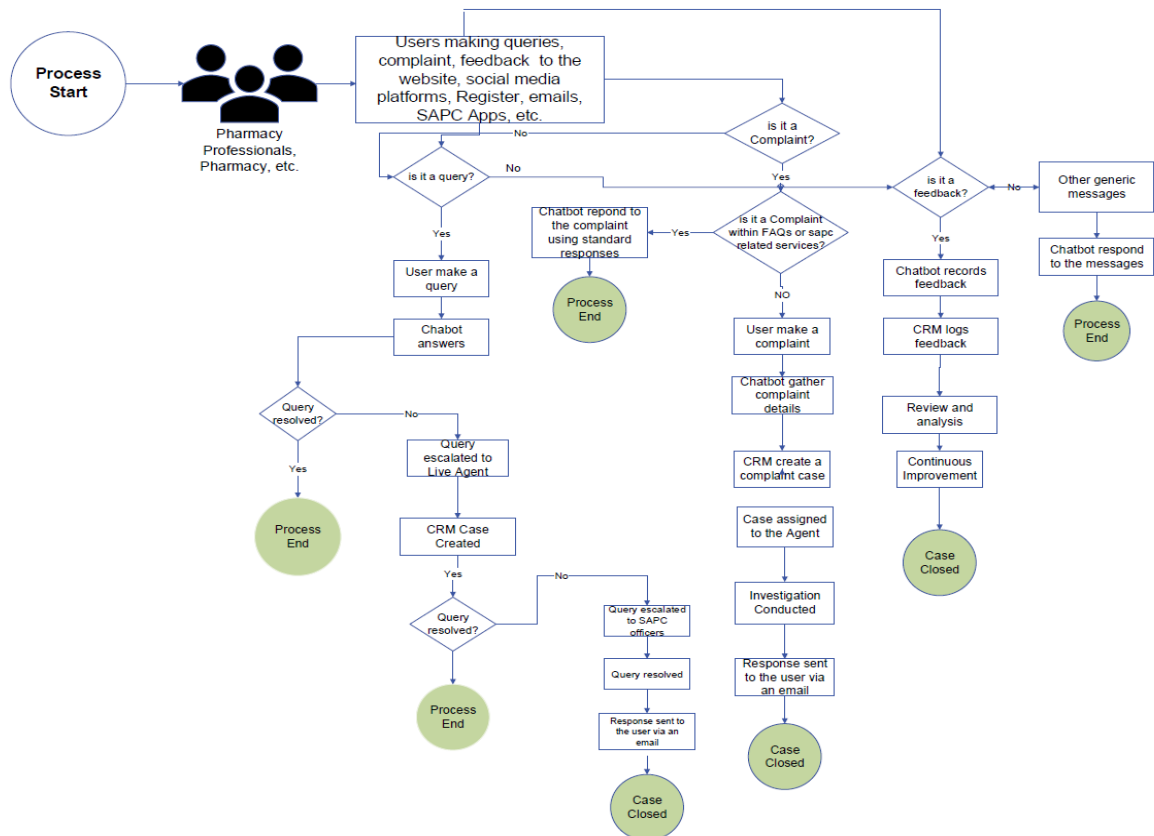
The interaction process, once the above services/solutions are implemented, should encompass the following steps:

1. Client/Stakeholder Interaction: Stakeholder/client enters via any channel (email, call, WhatsApp, etc.)
2. CRM: Logs interaction, creates/updates case.
3. Copilot/Chatbot: Engages user, answers basic questions, checks case status or account balance via APIs.
4. Agent Handoff: If needed, escalates to a human agent in Dynamics 365.
5. CRM Updates: All interactions are logged and visible to agents.

6.2 CRM, LIVE CHAT AND CHATBOT SOLUTION ARCHITECTURE

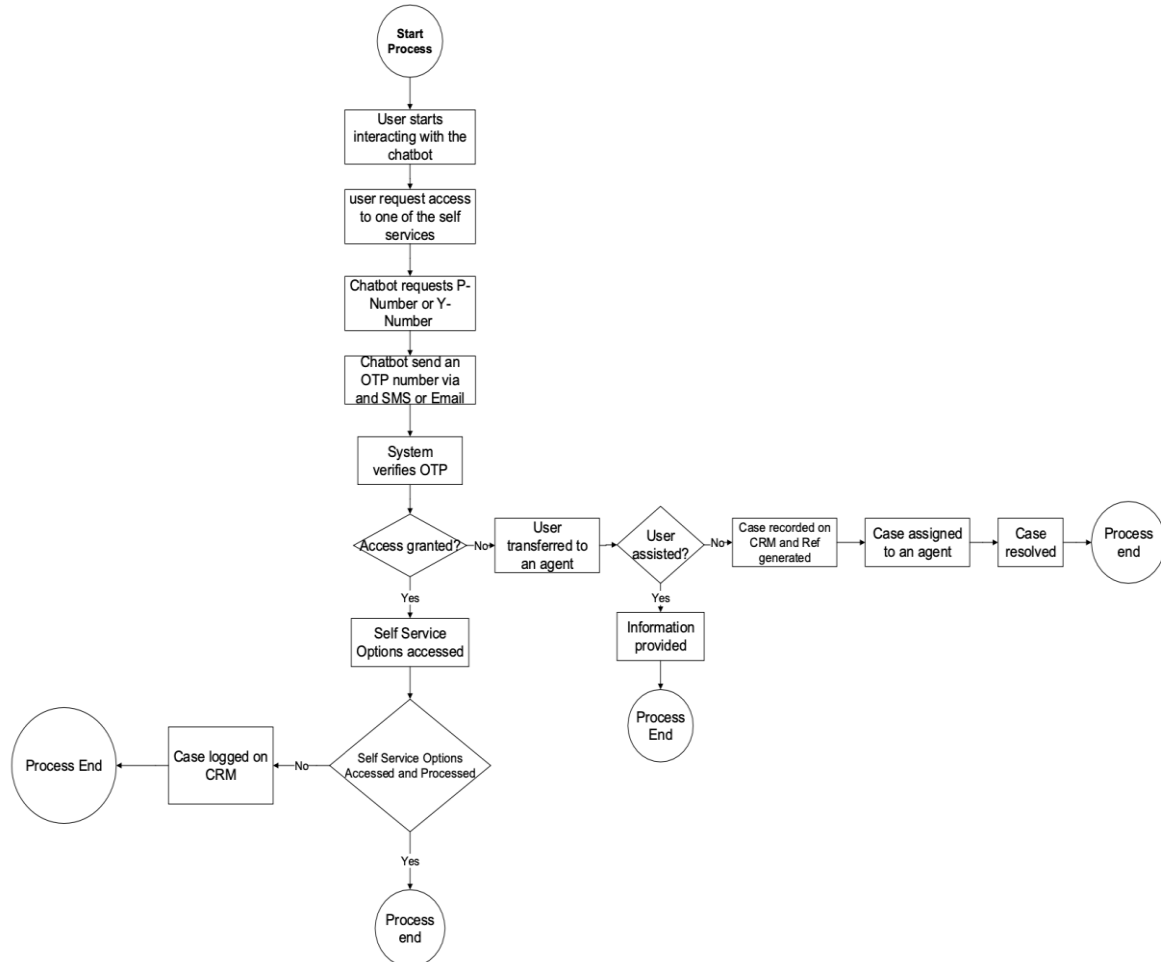


6.3 CRM, Live Chat and Chatbot Process Flow



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

7. MANDATORY AND FUNCTIONAL REQUIREMENTS

7.1. Complete compliance with the following mandatory requirements is conditional to the bid/proposal being considered. Non-compliance will result in immediate disqualification:

- (a) Experience in implementing D365 as a CRM (as indicated by a list of verifiable projects/clients);
- (b) Microsoft Certification of the bidder as a Partner or at least one member of the project team as a Certified Professional in relation to D365 CRM (as indicated by MCP proof and partner certification documentation); and
- (c) Demonstrated ability to fully implement D365 together with relevant Microsoft 365 apps and systems that interoperate with D365 for enhanced efficiency (e.g. Power Platform, Power BI, Copilot, etc.), as indicated by a list of variable projects/clients.

8. TECHNICAL REQUIREMENTS

The technical requirements for the implementation of Microsoft Dynamics 365 Customer Service as a Customer Relationship Management (CRM) System for the South African Pharmacy Council are as follows:

Category	Requirements
Hardware Requirements	Cloud-based solution (SaaS / PaaS).
Microsoft D365 Product	D365 Customer Service Premium (do not include licence fees in proposal costing)
Disaster Recovery	No data loss, synchronised data across primary and recovery sites.
Backups	Ensure that backups for the CRM solution are conducted as per the SAPC backup procedure.
Reporting & Analytics	KPI Tracking, SLA monitoring, customised reports, and integration into Power BI.

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 at the kick-off meeting will result in Council terminating 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 requirements will be finalised in coordination with the SAPC.

9.3 Technical Support and Maintenance

The successful bidder shall provide technical support and maintenance for a period of 12 months 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 the SAPC.

9.4 Project Team

The bidder should appoint a team and indicate such as part of their proposals, which team should, at a minimum, contain the following roles (where necessary, one person may fulfil up to a maximum of two roles):

1. Solution Architect
2. Functional Consultant(s)
3. Technical Consultant/Developer
4. Trainer/Change Management Specialist

10. CONTRACT PERIOD

The contract period will be limited to implementation (estimated at three (3) months) and 12 months of post-implementation support. Thus, the total initial contract duration will be for a period of 15 months.

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 in implementing Dynamics 365 as CRM (provide a list of implemented D365 projects/clients, with contactable references for each);
- (b) Proof of Microsoft Partner status and certification of at least one project team member;
- (c) BBBEE Rating scorecard;
- (d) Valid tax compliance status certificate;
- (e) Company registration documents;
- (f) At least three contactable references;
- (g) Risk Assessment Audit Form;
- (h) Complete pricing/costing; and
- (i) 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, excluding Microsoft licensing and consumption costs (e.g. Meta, Middleware fees, etc.).
- (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
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- (b) Proposals should be submitted by **21 October 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 (Including MS Partner status and certification).
 - (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.
 - (viii) Non-compliance with ANY of the mandatory requirements in 7.1 above.
- (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 ideal timeframes/duration required per phase and is provided for reference purposes while completing the costing:

Phase	Description	Duration
1	Project initiation and project management	1 week
2	Requirements Gathering & Design	2 weeks
3	CRM Setup & Channel Integrations	3 weeks
4	AI Chatbot Development	2 weeks
5	System Integrations Data migration from the old email CRM solution	4 weeks
6	Testing, Quality Assurance & User Acceptance Testing (UAT)	1 week
7	Training & Go-Live	1 week
8	Post-implementation support & maintenance	12 months

Phase	Description	Duration
	- Include training of in-house IT technicians to resolve basic support queries	

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

$$P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where -

P_s = Points scored for price of bid under consideration

P_t = Rand value of bid under consideration

$P_{\min}$ = 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 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

- (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)
Project initiation and project management	
Requirements Gathering & Design	
CRM Setup & Channel Integrations	
AI Chatbot Development	
System Integrations	
Data migration from old email CRM	
Testing, Quality Assurance & User Acceptance Testing (UAT)	
Training & Go-Live	
Post-implementation support & maintenance - Include training of in-house (User and technical training) to resolve basic support queries	
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 MICROSOFT DYNAMICS 365 CUSTOMER SERVICE AS A CRM SYSTEM

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)

$$P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where-

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

P_t = Rand value of bid under consideration

$P_{\min}$ = 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	2
2.	Project Management/or Methodology and Detailed Implementation Plan	2
3.	Implementation of Microsoft Dynamics 365 Customer Service as a Customer Relationship Management (CRM) System	3
4.	Bidder experience and capability requirements as per list of projects/clients	2
5	Team, Knowledge and Expertise	3

5.	Support and maintenance of the Microsoft Dynamics 365 CRM and Virtual Agent as per the proposal	2
6.	Skills Transfer and Training Requirements	3
Part B: Presentation		10
1.	Solution proposed with architecture, functional and technical requirements	2
2.	Case studies of Microsoft Dynamics 365 Customer Service as a Customer Relationship Management (CRM) System	2
3.	Implementation Plan	4
4.	Integration Ability/Plan	2
TOTAL		27

The technical functional evaluation criteria is as follows:

TECHNICAL FUNCTIONALITY REQUIREMENTS (PART A)	Substantiating evidence and Scoring Matrix Criteria (used to evaluate bid)	Total Points	Score
1. Bidder certification and affiliation requirements Microsoft Certification of the bidder as a Partner and at least one member of the project team as a Certified Professional in relation to D365 CRM (as indicated by MCP proof and partner certification documentation)	Attach copies of valid Microsoft Certification of the bidder as a Partner and at least one member of the project team as a Certified Professional in relation to D365 CRM Note: SAPC reserves the right to verify the information provided. 0=No proof of certification attached 1=Only one copy of MS Partner documentation and MS Certified Professional certification 2=Documentary proof of MS Partner AND at least two (2) MS Certified Professional certifications	2	
2. Project Management/or Methodology and Detailed Implementation Plan The bidder must provide a detailed project plan for implementing Microsoft Dynamics 365 Customer Service as a Customer Relationship Management (CRM) System, addressing all the key deliverables in accordance with the stipulated timeframe of three (3) months. The plan must include activities, milestones, resources, and timeframes. For the project plan to be valid, it must follow the timelines of three 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	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	

TECHNICAL FUNCTIONALITY REQUIREMENTS (PART A)	Substantiating evidence and Scoring Matrix Criteria (used to evaluate bid)	Total Points	Score
- Detailed resource allocation - Detailed timelines			
3. Implementation of Microsoft Dynamics 365 Customer Service as a Customer Relationship Management (CRM) System The bidder to provide information concerning the following key factors: - Details of the technical infrastructure to be used for this solution - Details of how their proposed implementation of Microsoft Dynamics 365 Customer Service as a Customer Relationship Management (CRM) solution meets or exceeds the requirements.	Evidence: Full supporting details to be provided as required above 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	3	
4. Bidder experience and capability requirements The bidder must have implemented and maintained Microsoft Dynamics 365 Customer Service as a Customer Relationship Management (CRM)	Evidence: Signed reference letters on company letterhead for the implementation of Microsoft Dynamics 365 Customer Service as a Customer Relationship Management (CRM). NB: SAPC reserves the right to verify the information provided 0 = No/incomplete reference letters points 1 = less than three relevant reference letters 2 = three relevant reference letters	2	
5. Team, Knowledge and Expertise The bidders must provide details of a project team of between 2 and 4 persons fulfilling the below roles, and supporting CVs, certified qualifications/certifications outlining their experience and capabilities in executing similar projects. (a) Solution Architect (b) Functional Consultant(s) (c) Technical Consultant/Developer (d) Trainer/Change Management Specialist	Evaluation: Experience, Certification and Team Size 0= No CV and/or no relevant experience 1= Two or more CVs with relevant but no certifications or less than 2 years' experience 2= Two or more CVs with relevant certifications plus experience (2+ years) 3= Four or more CVs with relevant certifications plus experience (2+ years)	3	
6. Support and maintenance of the Microsoft Dynamics 365 CRM and Virtual Agent as per the proposal The bidder must describe the process and mechanisms for handling inquiries 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	

TECHNICAL FUNCTIONALITY REQUIREMENTS (PART A)		Substantiating evidence and Scoring Matrix Criteria (used to evaluate bid)	Total Points	Score
		2= Bidder has documented incident management processes, implemented incident management tools, and managed the escalation and incident resolution process		
7.	Post-implementation support, Skills Transfer and Training Requirements Detailed plan for post-implementation support & maintenance; including the training of in-house IT technicians to resolve basic support queries 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= Detailed post-implementation support & maintenance plan/details 2= post-implementation support and maintenance plan and training plan attached but not detailed (i.e. number of sessions, duration of sessions, technical support availability) 3= Fully detailed training plan and post-implementation support and maintenance attached	3	

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

Sub-total points for pricing and functionality	
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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