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## REQUEST FOR PROPOSALS

### REQUEST FOR PROPOSAL – E-PLUS CUSTOMER RELATIONSHIP MANAGEMENT CUSTOMIZATION

**RE-TENDER NO. EMS000314**

**Document Release Date : 23<sup>rd</sup> August 2019**

**Submission Method : TENDER BOX at the Kenya Red  
Cross Society HQ Located at KRCS HQ  
South “C”**

**Tender Number : EMS000314**

**Last Date for Receipt of bids : 6<sup>th</sup> September 2019 at 11:00 am**

**Tender Opening Venue and Time : 12.00 Noon at KRCS HQ South C**

## **1.0 Introduction**

### **1.1 About Emergency Plus Medical Services**

Emergency Plus Medical Services (E-PLUS) is a company fully owned by the Kenya Red Cross Society, whose core business is the provision of advanced pre-hospital emergency medical services. In its 9 years of existence, E-PLUS has been providing pre-hospital medical care and transportation to patients with illnesses and injuries on a Commercial basis as well as under Corporate Social Responsibility, in fulfillment of the mission and mandate of Kenya Red Cross Society. E-PLUS is currently the largest private ambulatory services provider in East and Central Africa in terms of capacity, experience and technical personnel. We currently boast of employing over 260 fulltime medics and ambulance operators and operate a fleet of 128 ambulances, and growing. We have ambulances distributed throughout the country, including all the leading towns and remote oil drilling and prospecting fields. The ambulatory service is also linked to the Kenya Red Cross Society's nationwide branches with 63 branch offices and over 70,000 volunteers who are trained in First Aid and who are to give unrivalled support to the E-PLUS. We currently respond to over 15,000 emergencies annually and have unmatched wealth of experience and knowledge in handling all forms of emergencies.

E-PLUS has endeared itself to Kenyans due to its superior state of the art equipment, highly qualified professional personnel and fast response to all emergencies. By offering affordable professional services, we have grown our client's database and we are currently servicing clients ranging from learning institutions, hospitals, corporates, factories, event companies, the government, oil prospectors, transportation companies, banks and small and medium enterprises among others.

E-PLUS is the preferred Emergency Ambulance Rescue service in Kenya.

### **1.2 Background of the Project and Problem Statement**

E-PLUS is currently using Microsoft Dynamics Customer Relationship Management System (CRM) to manage our customer database but is not fully customized to meet the company's needs. E-PLUS' intent to use the system to manage many but not limited to the following business processes; customer data, customer interaction, access business information, track leads & opportunities, contracts, marketing, clients support, etc.

Further, E-PLUS has upgraded Navision to support its financial, human resource processes and procurement management, also uses Zone Control system for fleet management of our ambulances and 3CX for managing calls at our dispatch center. We intend to integrate these systems with Customer Relationship Management System (CRM) once fully customized.

## **2.0 The Consultancy**

### **2.1 Purpose of The Consultancy**

The consultancy will collect user requirements and carry out a needs analysis that will inform review, customize and implement all E-PLUS departmental tools. The main objective is to customize Microsoft Dynamics Customer Relationship Management System (CRM) to meet the Company's needs.

#### **Specific objectives**

- 2.2.1.1.** To conduct a needs/gap analysis of the Customer Relationship Management System (CRM) across all departments
- 2.2.1.2.** To customize the Business Development, Operations, Finance, Logistics and Human resource tools
- 2.2.1.3.** Develop and implement an end user TOT training for focal persons

### **2.3 Current Situation**

Currently E-PLUS is using the system to capture Ambulance calls at our dispatch center, booking events, manage our client's database with much limitations as it is not fully customized to meet our needs.

### **2.4 Deliverables**

- 2.4.1** Produce a detailed business process analysis (Gap/fit, description and interfaces) report and share with E-PLUS
- 2.4.2** Develop and customize relevant tools to meet the above needs/gap.
- 2.4.3** End user TOT training for E-PLUS focal persons.
- 2.4.4** Upgrade the sales and marketing modules to the client's needs
- 2.4.5** Upgrade the finance and operations module and integration to Microsoft Dynamics Navision

### **3.0 Schedule of deliverables**

- i. Submit an inception report 3 days after signing the contract. It should state the following details amongst others: methodology of carrying out the assignment, work plan and implementation schedule for the assignment, and any other issues that need to be raised at the onset of the consultancy.
- ii. Submit a draft report of the gap analysis with recommendation tied to costs and timelines. This will be presented to the Managing Director for approval before implementation of the action points.
- iii. Work with Managing Director to prioritize development of solutions to meet the above gaps and present a functional requirements document
- iv. Test and implement the functionalities.
- v. Train users.
- vi. 6 month implementation support
- vii. 2 months on-site post implementation support

## 4.0 Expertise and Minimum Qualifications of the Consultant

### Knowledge and Experience

- In depth knowledge of Customer Relationship Management software in the healthcare industry.
- Evidence of similar assignments conducted during the last 5 years
- Microsoft Customer Relationship Management Certified Partner

### Skill and qualifications

- Ability to perform analysis of E-PLUS needs and identification of gaps
- Have certified developers to customize the system where gaps had been identified
- Ability to plan and perform unit and modular testing.
- Ability to provide user manuals, and other technical documentation as well as training of key or end users.

## 5.0 Intellectual property rights

All documentation and solutions developed that relate to the assignment shall remain the sole and exclusive property of E-PLUS.

## 6.0 Duration

This consultancy is expected to take not more than 6 months from the date of commencement

## 7.0 Submission of Proposal

Proposals from bidders should be submitted in two distinct parts, namely technical proposal and financial proposal and these should be in two separate sealed envelopes, both of which should then be placed in a common sealed envelope marked:

**Re-Tender number: EMS000314**

**CUSTOMIZATION OF E-PLUS CUSTOMER RELATIONSHIP MANAGEMENT (CRM)**

**DO NOT OPEN BEFORE 6<sup>th</sup> September 2019 at 1200 Hours**

The two separate inner envelopes should be clearly marked “**Technical Proposal**”, and “**Financial Proposal**”, respectively, and should bear the name of the Bidder. Hard copies of the proposal documents should be submitted at the Tender Box located at the Society’s headquarters on Red Cross Road, South C and soft copies of the same tender documents will be emailed to [tenders@redcross.or.ke](mailto:tenders@redcross.or.ke)

Interested parties are invited to submit a separate technical and financial proposal by **6<sup>th</sup> September 2019 at 11.00 am** to the undersigned;

**Chairperson-Tender Committee**  
**Kenya Red Cross Society**  
**P.O. Box 40712-00100 GPO**  
**Nairobi.**

#### **STAGE 1 – COMPLIANCE WITH MANDATORY REQUIREMENTS**

- i. Company Profile
- ii. Certificate of Incorporation
- iii. Certificate from relevant regulatory authority / professional body (where applicable)
- iv. Valid Tax Compliance certificate.
- v. PIN Certificate
- vi. Company's Current CR12
- vii. CVs of proposed key personnel for the assignment and summary of proposed key staff as per the table below;

| <b>Name</b> | <b>Highest educational qualification</b> | <b>Number of days to be involved</b> | <b>Years of experience<br/>Related to the task</b> | <b>Roles in the assignment</b> |
|-------------|--|--------------------------------------|--|--------------------------------|
|             |  |                                      |  |                                |
|             |  |                                      |  |                                |
|             |  |                                      |  |                                |
|             |  |                                      |  |                                |

#### **STAGE 2 – TECHNICAL EVALUATION, FOLLOWED BY AN ORAL PRESENTATION**

- Firm's general experience in the field of assignment
- Firm's financial capacity
- Understanding of the aims and objectives
- Proposed Methodology
- Proposed work plan
- The qualifications and relevant experience of the personnel.
- Proposals for technical requirements.
- Overall Value proposition/ transfer of knowledge

### **1. Evaluation of the Technical Proposal**

The technical proposal shall be evaluated on the basis of its responsiveness to the TOR. Specifically, the following criteria shall apply:

| <b>Evaluation Criteria</b>   | <b>Maximum Points Possible</b> | <b>Bidders score</b> | <b>Remarks</b> |
|--|--------------------------------|----------------------|----------------|
| <b>(1) Introduction:</b> <ul style="list-style-type: none"><li>• Description of the Firm and the Firm's Qualifications</li></ul>   | 5                              |                      |                |
| <b>(2) Background :</b> Understanding of the project, context and requirements for services  | 10                             |                      |                |
| <b>(3) Proposed Methodology:</b> The proposed methodology MUST provide an indication of its effectiveness and added value in the proposed assignment.  | 20                             |                      |                |
| <b>(4) Firms Experience in undertaking assignments of similar nature and experience from related geographical area for other major clients</b> <ul style="list-style-type: none"><li>• Provide a summary and supporting information on overall years of experience, and related technical and geographic coverage experience</li></ul>   | 10                             |                      |                |
| <b>(5) Proposed Team Composition:</b> <ul style="list-style-type: none"><li>• Tabulate the team composition to include the general qualifications, suitability for the specific task to be assigned and overall years of relevant experience to the proposed assignment.</li><li>• The proposed team composition should balance effectively with the necessary skills and competencies required to undertake the proposed assignment.</li><li>• <b>Lead Consultant Qualifications</b> – should be as per the TOR</li><li>• <b>Mandatory</b>-statistician</li></ul> | 10                             |                      |                |

|  |           |  |  |
|--|-----------|--|--|
| <b>(6) Work Plan:</b> A Detailed logical, weekly work plan for the assignment <b>MUST</b> be provided. | 5         |  |  |
| <b>TOTAL SCORE</b>   | <b>60</b> |  |  |

Total scores of the technical bid analysis shall be converted to a denominator of 60. Top three firms will go to the orals stage and top two after the orals will go to the financial evaluation stage.

## 2. Oral presentation

| Criteria  | Score | Remarks |
|---|-------|---------|
| Understanding of the assignment<br>(2 Marks)  |       |         |
| Clear and scientific methodology<br>(4 Marks)   |       |         |
| <b>Presentation of</b> <ul style="list-style-type: none"> <li>Detailed CVs of team to be involved</li> <li>Evidence of legal Compliance-Registration, PIN certificate, tax compliance etc.)</li> <li>Two Sample reports of previous assignments</li> </ul><br>(4 marks) |       |         |

### STAGE 3 – FINANCIAL EVALUATION

Financial proposals will be evaluated on the basis of cost and lead-time and payment terms if not specified in this document. The maximum number of points for the Financial Proposal shall be **30% (30 points)**. This maximum number of points will be allocated to the lowest Financial Proposal. All other Financial Proposals will receive points in inverse proportion according to the below formula:

**Points for the Financial Proposal being evaluated =**

$$\frac{(\text{Maximum number of points for the financial proposal}) \times (\text{Lowest price})}{\text{Price of proposal being evaluated}}$$

EPLUS will evaluate the proposals and award the assignment based on technical and financial feasibility. EPLUS reserves the right to accept or reject any proposal received without giving reasons. EPLUS is not bound to accept the lowest or the highest bidder.

|   |             |
|---|-------------|
| Technical proposal                      | 60%         |
| Oral presentation of technical proposal | 10%         |
| Financial proposal                      | 30%         |
| <b>Total</b>                            | <b>100%</b> |

- 1.1.1.** Bidders are requested to hold their proposals valid for ninety (90) days from the closing date for the submission. EPLUS will make its best efforts to arrive at a decision within this period.
- 1.1.2.** All costs pertaining to the preparation of a proposal and negotiations of a contract shall be borne by the firms submitting proposals.
- 1.1.3.** Assuming that the Contract can be satisfactorily concluded, the bidders shall be expected to commence the assignment within one week after the final agreement is reached.
- 1.1.4.** The bid documents, shall be addressed to:

**Chairperson-Tender committee  
Kenya Red Cross Society  
P.O. Box 40712-00100 GPO  
Nairobi.**



**Kindly indicate the title of the project on the envelope**

Please read carefully the method of tender submission and comply accordingly.

**1.1.5.** EPLUS reserves the right to accept or to reject any bid, and to annul the bidding process and reject all bids at any time prior to the award of the contract, without thereby incurring any liability to any Bidder or any obligation to inform the Bidder of the grounds for its action.

**1.1.6. Cost of bidding**

The Bidder shall bear all costs associated with the preparation and submission of its bid, and the Organization will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the bidding process.

**1.1.7. Clarification of Bidding Document**

All correspondence related to the contract shall be made in English. Any clarification sought by the bidder in respect of the project shall be addressed at least **five (5) days** before the deadline for submission of bids, in writing to the Managing Director.

The queries and replies thereto shall then be circulated to all other prospective bidders (without divulging the name of the bidder raising the queries) in the form of an addendum, which shall be acknowledged in writing by the prospective bidders.

Enquiries for clarifications should be sent by e-mail to [tenders@redcross.or.ke](mailto:tenders@redcross.or.ke)

**1.1.8. Amendment of Bidding Document**

At any time prior to the deadline for submission of bids, EPLUS, for any reason, whether at its own initiative or in response to a clarification requested by a prospective Bidder, may modify the bidding documents by amendment.

All prospective Bidders that have received the bidding documents will be notified of the amendment in writing, and it will be binding on them. It is therefore important that bidders give the correct details in the format given on page 1 at the time of collecting/receiving the bid document.

To allow prospective Bidders reasonable time to take any amendments into account in preparing their bids, EPLUS may at its sole discretion extend the deadline for the submission of bids based on the nature of the amendments.

#### **1.1.9. Deadline for Submission of Bids**

Bids if send by post should be addressed to the address below on or before 6<sup>th</sup> September 2019 at 12:00 noon.

**The Chair Tender Committee  
Kenya Red Cross Society  
P.O. Box 40712-00100 GPO  
Nairobi.**

Bids sent by mail should reach by the same deadline. Bids received after the above-specified date and time shall not be considered.

Bidders should provide a **technical** and **financial** proposal in **two separate envelopes** clearly Marked “**Technical Proposal**” and “**Financial Proposal**” and sealed in one plain envelope clearly marked “***Tender No. EMS000314 E-Plus CRM Customization***”.

The Proposal should be addressed as indicated above to reach the under signed by 6th September 2019 at 11.00 a.m. for the tender to be opened at 12.00 noon

Any bid received by EPLUS after this deadline will be rejected.

#### **1.1.10. Cost Structure and non-escalation**

The bidder shall, in their offer (Financial Proposal), detail the proposed costs as per the template provided above.

No price escalation under this contract shall be allowed. EPLUS shall not compensate any bidder for costs incurred in the preparation and submission of this RFP, and in any subsequent pre-contract process.

#### **1.1.11. Taxes and Incidental Costs**

The prices and rates in the financial offer will be deemed to be inclusive of all taxes and any other incidental costs.

#### **1.1.12. Responsiveness of Proposals**

The responsiveness of the proposals to the requirements of this RFP will be determined. A responsive proposal is deemed to contain all documents or information specifically called for in this RFP document. A bid determined not responsive will be rejected by the Organization and may not subsequently be made responsive by the Bidder by correction of the non-conforming item(s).

#### **1.1.13. Currency for Pricing of Tender**

All bids in response to this RFP should be expressed in Ksh. Expressions in other currencies shall not be permitted.

#### **1.1.14. Correction of Errors.**

Bids determined to be substantially responsive will be checked by EPLUS for any arithmetical errors. Errors will be corrected by EPLUS as below:

- a. where there is a discrepancy between the amounts in figures and in words, the amount in words will govern, and
- b. where there is a discrepancy between the unit rate and the line total resulting from multiplying the unit rate by the quantity, the unit rate as quoted will govern.

The price amount stated in the Bid will be adjusted by EPLUS in accordance with the above procedure for the correction of errors.

#### **1.1.15. Evaluation and Comparison of Bids**

Technical proposals will be evaluated prior to the evaluation of the financial bids. Financial bids of firms whose technical proposals are found to be non-qualifying in whatever respect may be returned unopened.

#### **1.1.16. Confidentiality**

The Bidder shall treat the existence and contents of this RFP, and all information made available in relation to this RFP, as confidential and shall only use the same for the purpose for which it was provided.

The Bidder shall not publish or disclose the same or any particulars thereof to any third party without the written permission of EPLUS, unless it is to Bidder's Contractors for assistance in preparation of this Tender. In any case, the same confidentiality must be entered into between Bidder and his Contractors.

The proposal should be presented in the following format;

- i. Introduction: Description of the Firm, the Firm's Qualifications and statutory compliance, legal documents
- ii. Understanding of the Requirements for Services
- iii. Proposed Methodology
- iv. Firms Experience in undertaking assignments of similar nature and experience from the geographical area for other major clients
- v. Proposed Team Composition
- vi. References
- vii. Work Plan

Note: Include a budget for the consultancy as per the format below. **The financial proposal/quote should be presented in a separate sealed envelope**

| Item               | Unit    | # of Units | Unit Cost | Total Cost (KShs) |
|--------------------|---------|------------|-----------|-------------------|
| Consultancy Fee.   | Per day |            |           |                   |
| <b>Grand Total</b> |         |            |           |                   |

### **8.0 Evaluation and award of consultancy**

E-PLUS will evaluate the proposals and award the assignment based on technical and financial feasibility. E-PLUS reserves the right to accept or reject any proposal received without giving reasons. E-PLUS is not bound to accept the lowest or the highest bidder.