

# NOTICE OF PROPOSED PROCUREMENT (NPP) 19-717

## CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOLUTION

### PURPOSE OF THIS NOTICE:

Export Development Canada (EDC), per its obligations under Chapter Five of the Canadian Free Trade Agreement (CFTA) and Chapter Nineteen of the Comprehensive Economic and Trade Agreement (CETA), is announcing that it is undertaking a Product Review Process (PRP).

The objective of this process is to select a modern Customer Relationship Management (CRM) solution and platform offering Platform as a Service (PaaS) or Software as a Service (SaaS) licensing for future acquisitions.

### BACKGROUND

In 2018, EDC engaged strategic CRM consultants to perform an analysis of capability gaps in the CRM space that require filling in order to move to a digital business model and sustain or exceed customer targets for customer count. The analysis concluded that EDC's business environment and operations had significantly evolved since the current CRM technology was implemented and the technology was no longer adequate to support a future direction that requires insights driven reporting, strategic data management, a partnership enabling platform and mobility.

EDC has developed an Enterprise Technology Roadmap (ETR) leveraging industry best practices in alignment with EDC partners. The execution of this strategic roadmap will shape EDC's technology investments over the next few years, resulting in a scalable and future-proofed business technology platform. The guiding architecture principles of the strategic roadmap are: Customer Centric, Partner Centric, Cloud First and Platform Based with a strong preference for technologies with simple and intuitive user experience, automated workflows and ability to be deployed in incremental stages to provide value.

### ALL SUPPLIERS ("SUPPLIER(S)" MEANS AUTHORIZED LICENSOR)

Should suppliers wish to be included in this process, they must complete a "Letter of Interest" (as detailed below). Without exception, suppliers that do not submit letters of interest will not be considered in the Product Review Process (PRP). EDC is communicating directly with Suppliers only in this process and will not include re-sellers, channel partners and/or VARS.

### PRP PRE-EVALUATION CRITERIA

Potential (qualified) suppliers will be required to be **100% compliant** the following mandatory criterion and must address this criterion within the letter of interest.

1. Submit the associated Platform as a Service (PaaS) and/or Software as a Service (SaaS) license agreement.

## **INSTRUCTIONS FOR THE SUBMISSION OF A “LETTER OF INTEREST”**

The letter of interest must identify “NPP # 19-717 – CRM”.

Letters may be provided in either official language however the supplier should be advised that its response may be required to be translated in order to be assessed and EDC reserves the right to rely upon its translation as the basis for this assessment.

Letters of Interest must identify the supplier’s:

- Legal name
- Mailing address
- Telephone number
- Website/URL
- Contact (to coordinate receipt of the Non-Disclosure Agreement and PRP)
- Contact’s email address

Letters of Interest must be received by EDC by mail or by electronic mail ([npp@edc.ca](mailto:npp@edc.ca)) before 1:00 p.m. Ottawa Time on **July 5, 2019**.

Upon receipt of the letter of interest, a Non-Disclosure Agreement (NDA) will be issued to the qualified supplier, who upon execution of the unamended NDA will be entitled to receive the PRP documentation.

The PRP is scheduled to be released the week of **July 8, 2019**.

EDC may, in its sole and absolute discretion, change the foregoing dates and times upon prior written notice to the potential suppliers.

### **PRP EVALUATION CRITERIA:**

(Criteria and their associated weights are estimates and are subject to change at the discretion of EDC.)

#### Mandatory Submission Requirements

1. The Proponent must (M) provide completed pricing tables (Appendix C) for all goods and services required under this Product Review Process (PRP). All costs, including any One Time Costs, must (M) be provided with the Proponent’s Offer or submission as part of its Financial Proposal.
2. The Proponent must (M) provide an electronic copy (MS Word preferred) of all document(s) relevant to the negotiation of a definitive agreement such as: The Proponents License Agreement, Services Agreement, Maintenance/Support Agreement, etc.
3. The proposed Solution must (M) be Cloud based and made available using a Platform as a Service (PaaS) or Software as a Service (SaaS) model<sup>1</sup>.

#### Rated Requirements – 75%

Use Cases and Data Model  
Corporate Experience and Qualifications  
References  
Industry Standards  
Non-Functional Requirements  
Functional Requirements  
Scalability  
Technical Requirements  
Support Model  
Language

## Solution Demonstration – 25%

### Financial Assessment – Cost/Benefit Analysis

#### **NON-DISCLOSURE AGREEMENT:**

All participants in any subsequent PRP process will be required to sign EDC's Non-Disclosure Agreement without amendment prior to receiving the PRP documentation. Additionally, if deemed applicable by EDC, participants will be required to enter into a more detailed Agreement to ensure compliance with the requirements of the Privacy Act, should they be awarded the contract at the completion of the PRP process.

#### **GENERAL:**

EDC reserves the right to contact the referenced organizations for the selected provider as part of a subsequent PRP process.

EDC reserves the right to satisfy itself of the financial viability of the selected provider as part of a subsequent PRP process.

All documents provided in response to this NPP become the property of EDC.

This NPP and any submission received in response thereto, any associated PRP and proposal submitted in response thereto, and all related agreements, including a confidentiality agreement and services agreement, will be interpreted and governed by the laws of the Province of Ontario and federal laws of Canada applicable therein.

EDC has issued this NPP in order to solicit information from potential suppliers. EDC assumes no liability, responsibility or obligation whatsoever to any supplier with respect to any aspect of this NPP. EDC has no obligation to reimburse or in any way compensate any supplier for expenses incurred in connection with its receipt, review or response to this NPP or in connection with the negotiation of a confidentiality agreement, services agreement, or otherwise.

#### **BACKGROUND – EDC:**

EDC is a Crown Corporation that provides financing and risk management services to Canadian exporters and investors in up to 200 markets worldwide.

Founded in 1944, EDC is financially self-sufficient and operates on commercial principles.

Additional detailed information on EDC's services, organization, policies and financial operations is located on EDC's website at [www.edc.ca](http://www.edc.ca).

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<sup>i</sup> "Cloud Computing" is defined by the National Institute of Standards and Technology" as: a model for enabling ubiquitous, convenient, on-demand network access to a shared pool of configurable computing resources (e.g., networks, servers, storage, applications, and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction. This cloud model is composed of five essential characteristics, three service models, and four deployment models, as detailed here: <https://nvlpubs.nist.gov/nistpubs/Legacy/SP/nistspecialpublication800-145.pdf>.