

# NOTICE OF PROPOSED PROCUREMENT (NPP) 20-705

## EDC CUSTOMER EXPERIENCE AND RESEARCH PLATFORM

### 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 Request for Proposal (RFP).

The objective of this process is to select a modern Research and Customer Experience (CX) Measurement solution and platform intended to be the central repository for all NPS, Research, Panel and CX Touchpoints.

### BACKGROUND

The EDC Customer Experience (CX) and Research Teams are responsible for gathering insights from Canadian companies engaged in the trade ecosystem and customers to inform strategic decision making, marketing plans and the digital user experience. EDC relies on research and CX measures to better understand companies' needs and offer a more seamless experience. These insights also help EDC make better business decisions, build its brand and improve engagement with our target audience.

The anticipated term of the Agreement is intended to be 3 years, with two 1-year renewal options for EDC with the same terms and conditions.

Features & services include but are not limited to:

- Survey platform with multiple question features, skip logic, deployment and quota capabilities
- Capability to complete unlimited surveys within the contract scope
- Data analysis capabilities (e.g. weighting, recoding, coding open text and advanced statistics) within the platform
- Dashboarding capabilities
- Access for all EDC employees to reporting dashboards
- Automated survey deployment capabilities
- Closed loop process (e.g. survey results are automatically sent to EDC account manager)
- UX Measurement & testing capabilities
- Capability to conduct internal employee surveys

## RFP 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.

“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>

## POTENTIAL SUPPLIERS

Should potential suppliers of these services 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 RFP process.

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

The letter of interest must identify “**NPP # 20-705 – RFP for Customer Experience and Research platform**”. 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 RFP)
- Contact’s email address
- Must include the associated Platform as a Service (PaaS) and/or Software as a Service (SaaS) license agreement.

Letters of Interest must be received by EDC by electronic mail ([npp@edc.ca](mailto:npp@edc.ca)) before **1:00 p.m. Ottawa Time on October 14, 2020**. Upon receipt of the letter of interest, a Non-Disclosure Agreement (NDA) will be issued to the supplier, who upon execution of the NDA will be entitled to receive the RFP documentation.

The RFP is scheduled to be released the week of **October 12, 2020**.

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

## RFP EVALUATION CRITERIA:

### Mandatory Submission Requirements

1. The Proponent must (M) provide completed pricing tables (Appendix C) for all goods and services required under this Request for Proposal (RFP). 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. Features & services for the survey platform MUST (M) include:
  - a) Multiple question features
  - b) Skip logic capabilities
  - c) Directory & deployment capabilities
  - d) Quota capabilities
  - e) Community / research panel capability
  - f) Data analysis capabilities (e.g. weighting, recoding, coding open text and advanced statistics) within the platform
  - g) Dashboarding / report creation capabilities within the platform
  - h) Access for all EDC employees to reporting dashboards
  - i) Automated survey deployment capabilities (e.g. automatically taking a list generated by an external system, importing it into the platform and deploying a pre-existing survey to the list)
  - j) Closed loop process (e.g. survey results can be automatically sent to email address contained in embedded data after completion)
  - k) UX and CX measurement & testing capabilities
  - l) Training services
  - m) Customer support services
  - n) Clear and defined privacy policy for data management

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

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|-------------------------------------|-----------------------|
| • Stage II (a) – Written Submission | 55%                   |
| • Stage II (b) - Presentation       | 15%                   |
| • Stage II (c) – Product Demo       | 30%                   |
| • Stage III – Financial Assessment  | Cost Benefit Analysis |

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

All participants in any subsequent RFP process will be required to sign EDC's Non-Disclosure Agreement without amendment prior to receiving the RFP 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 RFP process.

### **GENERAL:**

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

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

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

This NPP and any submission received in response thereto, any associated RFP 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 Service Providers. EDC assumes no liability, responsibility or obligation whatsoever to any Service Provider with respect to any aspect of this NPP. EDC has no obligation to reimburse or in any way compensate any Service Provider 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.

## **ABOUT EDC**

For 75 years, Export Development Canada (EDC) has been dedicated to helping Canadian companies of all sizes succeed on the world stage. We are a financial Crown corporation that equips Canadian companies with the tools they need – the trade knowledge, financing solutions, equity, insurance, and connections – to grow their business with confidence. As international risk experts, we make trade safer for Canadian companies. Underlying all our support is a commitment to sustainable and responsible business.