MEDECINS SANS FRONTIERES
LÄKARE UTAN GRÄNSER

Request For Information

CRM System

Contents

[Link to file with dummy data]

Background

MSF in brief

Médecins Sans Frontières (MSF) is an international, independent, medical humanitarian organisation that delivers emergency aid to people affected by armed conflict, epidemics, natural disasters and exclusion from healthcare. MSF offers assistance to people based on need, irrespective of race, religion, gender or political affiliation.

MSF in Sweden

The Swedish section of MSF, founded in 1993, has four main areas of activity:

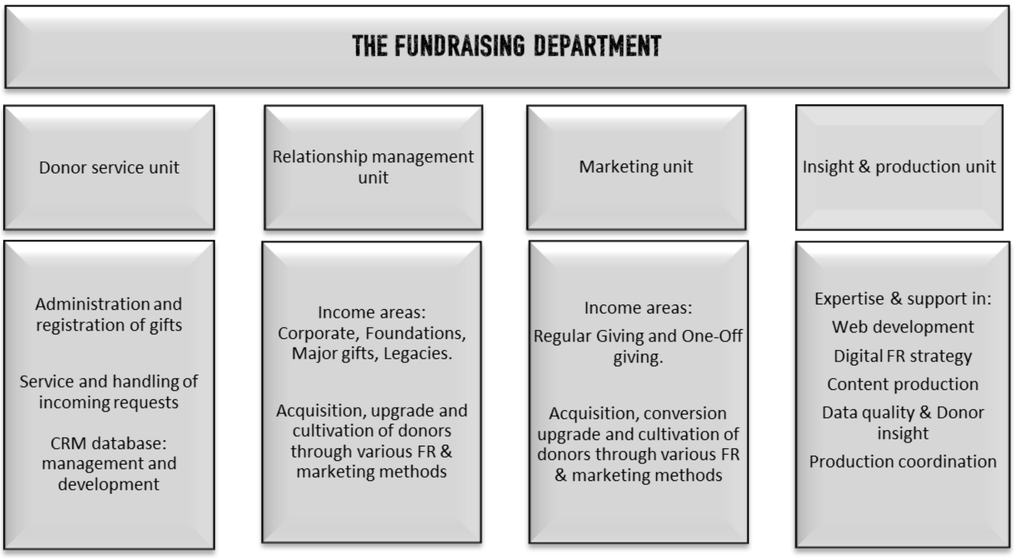
- Fundraising
- Recruitment and deployment of field workers
- Awareness-raising
- Support to the field activities through the innovation and evaluation units.

MSF Sweden raises money through donations and in addition recruits field workers, as well as forms public opinions. We inform the public, politicians, media and experts on the lives of the people we meet in the field. For more information about MSF please visit our website.

Fundraising at MSF Sweden

MSF Sweden's fundraising serves the purpose of generating increased, long-term, cost-effective, ethical and stable financing of MSFs operational needs. MSF Sweden requests funds from existing and potential donors through various media including direct mail, email, telephone, and digital advertising throughout the year. In 2019 more than 255 000 people decided to support MSF with over 616 MSEK. Donor relationship and donations processing is the backbone of this successful Fundraising.

There are currently 45 people working at the Fundraising department and the two overarching activities in the Fundraising department are Donor acquisition & Donor cultivation.



The Marketing Unit is accountable for the results of MSF Sweden's fundraising from the target group Private donors. The target group Private donors is individual donors (B2C, excluding major donors). The unit sets the strategy, plans the activities and communication, calculates projections/forecasts results and evaluates/analyses results.

The unit is split into two parts that work respectively with acquiring new donors and cultivating existing donors. The acquisition team works with classic marketing techniques, developing campaigns, leveraging digital and programmatic marketing and they work closely with media and ad agencies. The other half focuses on donor loyalty and work a lot with converting one time donors to regular donors, cultivating and anti-churn activities and activities aimed at increasing the donor lifetime value of existing donors. The loyalty team develop and adapt donor life cycles, donor journeys and marketing automation efforts as well as donor segmentation.

The Marketing Unit is also responsible for the two marketing channels of telemarketing and F2F/D2D. These are almost exclusively used for the acquisitions of, conversion of or upgrading of Private donors.

The Relationship Unit works to recruit, cultivate and deepen relationships with private donors donating larger gifts, companies and foundations and also manage legacies.

Legacies - ensure financial support from legacies by strategic planning and high qualitative service to segment of supporters to MSF Sweden in order to enable the continued growth in MSF Sweden. The function should provide the best service to donors and other important stakeholders in the process of handling legacies. Example of tasks related to legacies administration such as respond to summons to estate inventory proceedings, manage reconciliations of distribution of estates, archive of files.

Corporates - there are two business areas within corporates: corporate collaborations and corporate gifts. Corporate collaboration: ensure an increased long- term income from corporate collaborations through recruitment of new donors and maintain and secure existing partners by develop partner loyalty and retention. Corporate gifts ensure an increased long-term income through corporate gifts (especially around Christmas) through recruitment/marketing of new gifts and maintain and secure existing partners by develop partner loyalty continuously improving and optimizing the product sales towards companies.

Major donors - ensure an increased long-term income from major donors throw recruitment, upgrade and cultivation. Continuously improving and optimizing our give backs towards major donors through different solutions, continuous learning, result follow up and analysis. Stay informed on new ideas and possibilities for fundraising in Sweden and within the movement. Develop understanding for MSFs needs in balance with our donors needs in order to develop the area further.

Foundations - ensure an increased long-term income from foundations and high qualitative material and analysis to the team through prospect research and market analysis, manage report writing and communication to key donors to MSF Sweden. Responsible for and the overall communication, including report writing in for PKL (Postkodlotteriet), our biggest donor and Radiohjälpen. Securing funds from new as well as from warm foundations through application writing and the reporting back in close collaboration with counter part in HQ -OCA and OCB.

Donor Services unit (DS) is the part of MSF Fundraising unit that handles incoming donors and gifts and have a daily direct contact with Donors through phone, email and chat through qualitative and professional handling, communication and attitude.

DS register gifts from private donors, corporate donors, legacies and foundations. Donors service handle donor information in the database and keep the database in order of high quality and legal rules (GDPR) as well as updating information on donor data on regular basis. Many gifts are coming in through automatic processes as SMS and swish.

DS also systemize incoming gifts, registration dossiers for electronic mandates, download the concessions made via the website, balancing of PlusGiro, bank and online accounts in the database, administer a daily financial report and note deviations. DS send out Memory gift-letters, Thank you-letters, newspaper and other communication to donors.

Donor Service also gather Donor comments, reflections and aspects and share them with Fundraising Department to get a full feedback-loop of the way Donors experience our communication.

Insight and Production Unit supports the Fundraising Department with expertise in analysis, data visualization, digital strategy, web development, content production and production coordination. With our expertise, efficient production processes and high production quality, we help to secure the long-term goals of the Fundraising Department.

The main responsibilities are:

- Providing expert advice, analysis and insights to stakeholders responsible for the different business areas within the Fundraising Department.
- Coordination, concept development, production and delivery of activities set in the yearly Fundraising Department Activity Plan.
- Supporting the management of, and providing tools for, budgeting, forecasting and planning as well as delivering of reports to external stakeholders.
- Supporting the Fundraising Department with data verification, visualization and donor insights.

Functions within the unit: Unit manager, data specialist, fundraising analyst, content producers, content editor, production coordinator, digital fundraising strategist and webmaster.

Current System Capacity

As of today, MSF Sweden's current CRM processes on average 1 665 886 payment transactions in a year; With the peak transaction days being the day of monthly withdrawal (payment via direct debit), the last year the maximum number of monthly payment transaction exceeded 54 000.

The system should be able to process the arrival of at least 30 donations per minute (with this number expected to grow in the event of future process automation).

Other transactions operated in the CRM is the registration of new donors, in a day MSF Sweden can register up to 3500 new donors. The registrations can be done manually by our staff at donor service, through upload of files or via integration.

CRM also contains welcome processes to newly registered donors that can be executed manually into campaigns.

We hope to see these numbers grow as we improve automate fundraising processes and execute new donor and donation acquisition strategies.

Scope of RFI

This section is for you as a Respondent to the RFI request to get an understanding of what the high-level expectations are from MSF Sweden regarding a modern CRM system. This will be further detailed in the requested features section.

The CRM system shall be a solution that uses modern technologies and provides:

- Likely a SaaS based platform
- Enable a high level of automation
- A wide range of standard functionality that supports the specifics of fundraising
- The solution is flexible to allow for both B2B and B2C relationship management
- An easy to integrate system, open access to interfaces
- Modern, intuitive user interface
- A full system GDPR compliance

From the supplier, we seek a long-term strategic partner that can support and guide us in a rapidly changing environment, both regarding IT-solutions and the fundraising environment.

As the definition of a CRM system on the market is not obvious, we want to guide you what we are aiming at:

A CRM system manages and evolves the relation and communication with existing and potential donors, including managing information about payments methods and amounts automatically. The objective is to increase loyalty and income throughout the donor's life cycle. The aim is to have a CRM that sends the right message to the right donor, in the right channel in a timely manner. It holds a central database about the donor and its history. Data is compiled from a range of different communication channels and offer a large range of automated processes to minimize manual efforts. Further, it allows users to execute reports about donors and income within and outside the system through data exports. The CRM should focus on Donor relationship management.

Guidelines to the RFI

- MSF Sweden will use a digital Microsoft form for your responses. We expect one submission per supplier. Should we find multiple answers we will use the most recent response. The supplier will receive a copy of all responses made in the company's name. Should a discrepancy be identified MSF Sweden will dismiss the submission. MSF Sweden cannot be made accountable nor responsible for fraudulent responses.
- For any information requested during the RFI process, MSF Sweden reserves the right to distribute that information to all Respondents, even if the information has only been requested by one Respondent.
- MSF Sweden has no obligations to the respondent, the purpose is for you as a supplier to qualify for a RFP process and for MSF Sweden to prepare for it.
- The responding company cannot charge MSF Sweden for any cots for their efforts participating in this RFI process.
- The respondent is required to answer the questions truthfully and accurate to the questions.
- Only people connected to the RFI process at MSF Sweden will have access to provided information. If any part of your information, as an exemption, needs to be treated with strict confidentiality you need to state that explicitly.

Process

Currently, MSF Sweden uses Charity and Analytics as a CRM system, provided by Softronic. The system has supported most of our needs so far. However, as policy, MSF Sweden send out a tender request every third year to investigate if the current solution and service are competitive and evolves according to market. Still, our aim is to find a long-term partner.

The first step in this process is to request information from different CRM suppliers to understand what systems and suppliers will best meet our needs. For selected suppliers, we will invite to a demo session. At a second step, we will continue with a Request for Proposal process with the objective to reach an agreement with a CRM supplier.

The planned timeline is

RFI

- Start of RFI: 2020-02-21
- RFI response by supplier: 2020-03-13, earlier is preferred
- Supplier informed if qualified to the Demo session: 2020-03-18
- RFI Demo sessions: 2020-03-25 to 2020-04-03

RFP

- Start of RFP: 2020-05-04
- RFP response by supplier: 2020-05-29
- RFP Q&A and Demo session: 2020-05-25 to 2020-05-29
- Supplier informed if qualified finalist to the RFP: 2020-06-19

After the RFP, the next step is to set the final terms of an agreement. The estimated start of an implementation project is September 2020 and put in production Q2-2021.

Demo session

If you are invited to a demo session, we will ask you to run these use cases in order to get a brief understanding of usability and what functionality your system provides. The use cases for the demo are listed below. See also the link to file with dummy data (included in the zip file you got) that we propose to use for the demo session. the If there will be a time restriction, please prioritize in the following order.

1. I can easily create different reports and export data as needed on all system objects (donor profile information, campaign cost, activity information, donation information, donor history)
2. Ability to import data from different systems via integrations or other technical solution, the data can be used to complete/update, donor profile, contact information, donation information, activity information, crowdfunding information
    - Bulk creation of new donors from a file (dummy set in provided link)
    - Updating records through file read

3. Smart management of 3rd party actors in donation process (funeral homes when making an honorary gift, Legacy gift management)
    - A promise of donation to a wedding held at a venue.
    - Two first names and two last names
    - Printed letter (including the names) to be sent to venue
    - OCR Payment slip printed/digital to be sent to donor
    - Thank you, printed to be sent to donor
    - On request - information letter/digital to be sent to the couple with the total amount donated and how many donations in total.
    - Above could also relate to memorial donation, that letter would be sent to a funeral home. Many funeral homes are often recurring as receivers of the letters, show how you manage recurring name and address details for funeral homes.
4. The donor profile should contain information about transactions, activities and donor interests and their evolution over time, I should be able to report on these items.
5. I can easily create campaigns of my donors and follow their reactions to the marketing campaigns
6. I can easily create segmentations and assess if segmentation is coherent and change segmentation.
7. I can easily create and overview automated donor journeys that are accurate, timely and relevant, based on donor lifecycle and relationship.
8. Ability to see and analyse all campaigns
9. Ability to create files to send letters via post
    - Using donor information from CRM the template is created
    - The aim here is to create a file that can be printed inhouse or that can be sent to our printing company
10. I can easily create a donor value management analysis and segmentation based on own criteria and data.
11. Clear data clean up automations (duplicate management, data updates from data registry etc.)
    - Identifying and managing duplicates of various kind in CRM. Focus should be on donor cards.
    - Donor cards: how users can use duplicate management, small scale/ big scale. Criteria to identify duplicates, is criteria flexible and adjustable. Flexibility in what fields to be kept in the one donor card when merging, merged card can have more useful info and needs to be stored.
    - Adding new donor: CRM should alert if semi identical info already exists.
    - Show other scenarios for duplicate management and/or CRM warnings when a user is about to create duplicates outside of donor card e.g. adding the same campaign twice.

12. GDPR compliance: Ability to define different retention period, we will share two examples that are presented only for your reference
    - ability to have professional contacts under an organisation (corporation or foundation) expire (deleted) after 3 years if the organisation has not made a gift in the last 3 years
    - ability to say donors who are private individuals with a donation exceeding 100 000 SEK shall be anonymized after 5 years while private individuals who have only 1 donation of value inferior to 10 000 SEK will be anonymized after

You will also have a moment to demo what you believe are your best competitive advantage of the system and you as a supplier, based on your knowledge of the CRM market and our expressed needs in this document.

Demo Agenda

- 5 min: Welcome/Introduction
- 20 min: Supplier/system presentation (Information needed to support the demo)
- 60 min: Use cases run through
- 30 min: System offer competitive edge (What is the competitive advantage of your system)
- 5 min: Conclusion and sum up

Requested information

Communication instructions

- The first step is for you to announce your interest to participate in the RFI.
  Send an e-mail to
    - Subject filed: "PARTICIPATE IN CRM RFI".
    - Include your company name and contact information in the mail
    - **Note:** This email will be used in all communication with MSF Sweden.
    - You will then receive an e-mail response as a verification we have received your participation.
- You will respond in two channels:
    - One part via a Ms digital Form – mainly questions with fixed answering choices.
      Note: You need to fill in the complete form in one session, hence we recommend to first review the questions in this document and then fill in the form in one session.
    - One part via Ms Word sent in via e-mail – mainly describing questions
    - In email conversation with MSF Sweden use CRM-system@stockholm.msf.org
- Jonas Gustavsson is MSF Sweden's contact person and project manager of this RFI request. MSF Sweden will endeavour to answer all questions as quickly as possible but cannot guarantee any response time. Phone number is: +46760499091
- The RFI request shall be mentioned as "RFI CRM-system" when communicating (phone, email) to MSF Sweden.
- Any question regarding the RFI request will be anonymously posted on a public excel that all Respondents can access (as MSF Policy). MSF Sweden will endeavour to respond as quickly as possible.
- Please **do not submit generic marketing materials**, broadly descriptive attachments, or other general literature.

Response via a digital form

The questions under this section shall be answered via a digital form via a provided link.

Company information

- System name of intended CRM system in the RFI response
- Responding company contact information
    - Company name
    - Org number
    - Address
    - Web-address
    - Contact person name
    - Email to contact person
- System provider (if other than responding company)
    - System name
    - E-mail address
- Address of the office that would support MSF Sweden (if other than above)
- A declaration that the Respondent commits to the terms of this RFI request.

Integrations

This section describes the systems our CRM system currently communicate with. The purpose of this section is for MSF Sweden get an understanding of how well prepared your system is for our system landscape.

You will have the following response alternatives:

Standard integration exists:	Standard information flow between the two systems exists or integration has already been built.
Experience with supplier:	There is no standard integration, but the supplier is known and you can provide experience reference
Experience with similar application:	This system and the supplier is unknown, but you have worked with similar applications
Solution type and supplier are unknown:	You have never worked on an integration with such an application and you do not know the supplier
CRM system native application:	The supplier/solution suggested has a CRM native application in your CRM platform - plug and play scenario.

The systems our current CRM communicate with:

Supplier	**System**	**Description**
APSIS	Apsis pro (might migrate to Apsis One)	Digital marketing automation
OneTrust	OneTrust	Privacy, security and third-party risk management software
Dibs payment services	Dibs	Online payment provider
PayEx Sverige AB	PayEx	Online payment provider
Digitalist	Drupal 8	CMS, Website base
Microsoft	Azure Active Directory	Identity and access management services
Microsoft	Outlook	Mail and calendar management
Soluno	Soluno	Business communication provider (VOIP, SIM etc.)
Loxysoft	Dialer	Telemarketing management system - outbound calling
Microsoft	Power Bi	Data analysis and Business Intelligence
Asana	Asana Business	Content production project management
Microsoft	Office 365 enterprise	Subscription to Microsoft services: teams, forms, power automate, power apps etc.
Microsoft	Sharepoint	Group documents. Internet websites
Microsoft	One drive	Document sharing and collaboration
Facebook	Facebook Charity	Peer to peer fundraising on Facebook
BetterNow	BetterNow	Peer to peer crowdfunding platform
Scrive	Scrivesign and scriveauth	E-signature and e-authentication supplier
VISMA	Visma	ERP, Finance management and payroll

Payment methods

This section describes the payment methods that are of particularly interest for MSF Sweden. We are interested to understand your experience for each method.

You will have the following response alternatives:

Payment method implemented in the past: select this option if you are familiar with supplier/payment method

Payment method unknown: select this option if the payment supplier/method is unknown to you

- Payment methods
    - Payex
    - Swish
    - CellSynt
    - Facebook Charity
    - BetterNow
    - Plusgirot- OCR
    - Bankgirot
    - Autogiro
    - Stripe
    - iZettle
    - Benify
    - Plusgirot – Manuel
- Are you aware of P27 and are you taking measures to prepare for it?

System Features

This section describes the system features of particularly interest for MSF Sweden. With this section, we want to get an understanding of how well your standard product meets our needs and to what level adaptations are needed.

You will have the following response alternatives:

Standard:	CRM standard feature
Customizable:	Feature can be built API with another application: You can suggest a least one application to integrate to make feature available
Native CRM application:	There is an application/add-on that can be used to achieve request
Not managed:	Not within the scope of the CRM No Input: you do not have input to answer or the request was not understood

Activities or events involving donors.

These can be webinars, meetings, conferences, meetings defining reports they need from MSF Sweden, or even deadlines of donor requests.

- As a CRM user I can see all events/activities I have created and that I have been invited to
- As a CRM admin I can manage the list of different activity types
- As a CRM user I can track cost of my activities
- As a CRM user I can see all donors that are included in the activity and track actual participation
- When looking at donor profile I should see all activities they have been invited to and have attended
- System can detect call made to phone number tagged to donor and log it

Data transfer and reporting

Relative to exporting and importing information towards and from the CRM.

- It is easy to create different reports on all objects and fields without the need of a consultant
- I can export data from CRM DB without the need of a consultant
- Ability to important data from other systems or files(txt or XML or xlsx etc.) to complete information in the CRM
- Ability to save custom reports for future extractions
- Real-time data reporting
- Swedish reporting standards (SI4...)
- API exists ability to integrate to other systems

Donation Registration

How is the donation registered in the CRM system.

- Ability to manage peer to peer crowdfunding
- Ability to identify Donor that initiate the crowdfunding
- Ability to identify all actors in a fundraising event(even if actual financial contribution is unknown or actors are anonymous)
- Smart management of 3rd party actors in donation processing (Wedding event hosting venue receives gift certificates)
- Payment method used is indicated in donation
- Management of recurring gift agreements
- Ability to have prospect gifts (donation type and amount still unknown)
- As a CRM admin I would like to manage list of donation types without the need of an external consultant
- For Organisations that donates, I can define a key contact responsible for that donation

Donor Profile

By donor profile we mean the object that will hold donor and donation information with regards to the donor.

- Ability to create prospect donor
- Ability to manage an Extensive list of communication options (example: email donor only about projects in women's health)
- Extensive contact management options for organisations (identify different roles in the organisations and how many donations are tagged to each contact)
- Ability to define relationship between CRM user and contacts in an organisation
- Ability to track relationship between donor and CRM users
- Ability to define inter-donor relationship (hierarchy like head office/branch, but also influencer donor towards other donor profiles, fundraiser and the group they fundraise with)
- Defining different data retention periods and automatic donor anonymization process
- Ability to analyse anonymized donor data (personalized information is removed but behaviour kept)
- Store data relevant to Donor Value identification
- Enables donor lifetime value (for example from first donation to legacy donation)
- Donor profile should contain information about donor donation transactions, activities, campaign reactions, donor interests and how each item has evolved over time
- Ability to see what donor journey/donor journeys the donor belongs to and what step they are on.

Marketing

The below use cases refer to marketing towards donors, communication from MSF towards its donors

- I can easily create customer segments and assess if segmentations is coherent and change segmentation is wished
- I can easily create campaigns and track donor responses
- I can easily tie donations to a campaign
- I can report on the ROI of a campaign (how much it cost versus total donations received)
- I can easily create donor journeys and change them
- I can report on campaign efficiency with real-time data
- system will notify me if donor journeys are repetitive or donors run the risk of receiving more communication than intended
- Email communication channel exists
- Postal (printed files) communication channel exists

System Administration

The below are items relevant to system administration and maintenance tasks that can be owned by MSF Sweden.

- A large portfolio of actions that can be performed by MSF staff, such as creating reports, enabling some automation without the need for external consulting
- Admin can easily manage user profile read write rights
- Ability to Integrate to Azure Active Directory
- Customized objects and standard objects are easy to dissociate

User friendliness

- I can see all activities I am tagged in or that I initiated
- I can see all tasks and deadlines relevant to me or my team
- Ability to load data through files (txt, csv) loads - example campaign reactions captured through paper face to face or before full integration is achieved.
- Enables automation
- Ability to use CRM from any device (mobile, tablet, pc)
- User interface in Swedish
- A large portfolio of actions that can be performed by MSF staff, such as creating reports, enabling some automation without the need for external consulting
- Ability to delegate responsibilities when absent

Donor Service

Below are requests from Donor service, the frontline when donors call in for a request. This is the Donors communicating to MSF

- I can easily email donor relevant information and this action is stored in CRM
- I can easily create a file to be sent via post for the donor
- Ability to launch search and get Extensive classified results and options to run advanced search (selecting certain fields or objects)
- I can easily register a new monthly donor and start a donor in the process
- I can easily create a prospect donation (create and edit gift certificates)
- Interface is user friendly and allows me to quickly understand who the donor is and the latest interaction with us
- I can easily write comments notes remarks the donor wishes to give MSF
- I can create follow-up tasks and assign them to CRM user or CRM user group based on donor request

Response by email.

The questions in this section shall be responded by e-mail.

Create a Word document and use the table below for answering.

Send it to the provided e-mail address according to instructions above.

- In e-mail Subject write: “CRM RFI RESPONSE”
- The file shall be named: “CompanyName_CRM_RFI_RESPONSE”
- If any other attachment is needed it shall be named Companyname_QuestionID_NameOfDocument.nnn

Note:

- The below response Table and all attachments shall be sent in **one mail only.**
- No answer shall be longer than half A4 page.
- Only use additional attachment for further elaboration if mentioned in the question.

<table>
<tr><td colspan="2">Company information:</td></tr>
<tr><td colspan="2">C1. Describe the organization of the people working with CRM
(e.g. implementation, operation, support, development, etc.) i.e. the roles and number of FTEs in each area.</td></tr>
<tr><td colspan="2">[C1 Answer]</td></tr>
<tr><td>C2. How many companies-/organisations use your CRM system?</td><td>[C2 Answer]</td></tr>
<tr><td>C3. How many of these are Swedish companies?</td><td>[C3 Answer]</td></tr>
<tr><td>C4. How many of your customers are fundraising organizations?</td><td>[C4 Answer]</td></tr>
<tr><td>C5. List the 3 biggest fundraising organizations</td><td>[C5 Answer]</td></tr>
<tr><td colspan="2">C6. As reference, list the 3-5 latest implementations you have done of your CRM system.
(Follow the below example for each customer)</td></tr>
<tr><td colspan="2">[C6 Answer]
• Organization name:
• Contact person for references:
• E-mail to the contact person:
• Industry:
• The year put in production:
• Length of the implementation project:</td></tr>
<tr><td colspan="2">IT and security</td></tr>
<tr><td colspan="2">I1. GDPR protocol
Briefly describe what your GDPR breach protocol</td></tr>
<tr><td colspan="2">[Answer]</td></tr>
<tr><td colspan="2">I2. Data hosting and backup
Describe how and where data is hosted. In your description can you specify if you have data restoration process</td></tr>
<tr><td colspan="2">[Answer]</td></tr>
</table>

I3. User/integration behavior / Data discrepancy protocol If a non-GDPR breach is detected what is the protocol to follow?
[Answer]
Services
I4. SLA and support Describe the standard SLA and pricing model for SLA options. As initial information, normal working hours for MSF Sweden is 09:00-17:30. Outside of this only emergency support is needed. Use attachment if needed
[Answer]
I5. Training Describe the training capabilities provided in the standard contract and the pricing model for it. Use attachment if needed
[Answer]
I6. Implementation project Describe the plan, methodology, roles and average time plan you would normally use. Also add minimum FTE needed for each role. Use attachment if needed
[Answer]
I7. Pricing model MSF Sweden want to understand the model for total cost of ownership. • What cost items are included in your implementation model • What cost items are included in for the agreement period Use attachment if needed
[Answer]
I8. Trends What trends do you foresee within the CRM market in general and in fundraising specifically? Use attachment if needed
[Answer]