RFP Checklist

A tool for companies who
start a CRM selection process

IN THIS DOCUMENT

INTRODUCTION

What is it?

The Cegeka RFP checklist for CRM is **a tool** for companies that are looking for **a new CRM system or want to replace their current CRM software**.

How can I use it?

You can use this document to ask potential suppliers in a clear and structured way about their expertise and CRM solution(s).

Is it complete and ready to use?

This document is an aid. A well-founded starting point for companies that are faced with the difficult and time-consuming task of starting a CRM selection process. This document will get you started by doing a lot of preparation for you.

Can I select the right partner?

Honest? No! **An RFP checklist helps you to map out a mass of basic information about potential suppliers and solutions in a structured way**. But that's just a starting point.

Because CRM projects are not just about technology, but also (and above all) about business goals and people. **The right partner not only implements but guides you in optimizing your specific processes to achieve the objectives and helps you enthuse your people to use the system effectively and efficiently.**

Use this document eagerly, but don't fixate on functions & features.

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INTRODUCTION

Part 1

This section contains a **general information sheet** that you can use to present your organization in a complete and structured way.

In addition, we also provide you with a **list of questions** that you can ask potential suppliers. This concerns information about their:

- Activities
- Experience with CRM
- Experience with your field and business processes
- Range of solutions
- Research & Development
- Offer of training
- Organization of customer service and support

Part 2

This part contains a **detailed requirements list** in which the presence of functions can be surveyed for each domain of the proposed solution.

The requirements list should be used as a baseline that describes the most common features within the various domains of CRM.

You can obtain part 2 easily and free of charge by sending a request to: rob.hufschmitt@cegeka.com

INFORMATION TO PROVIDE

Description of your organization

1. Company name and status
2. Address
3. Number of branches
4. Description of activity and/or service (CRM strategy, competitive strategy, type of sales and distribution channel, long or short sales paths)
5. Brief history
6. Some key financial figures and number of employees
7. Number of employees per department:
    - Marketing
    - Sales (how many in the office, how many in the field?)
    - Customer Service
8. Description of your business objectives
9. Composition of the organizational structure
10. A brief description of the current IT landscape

INFORMATION TO PROVIDE

Description of your current CRM environment

Describe your current CRM or custom solution. If you don't currently have a CRM solution you can go to question 19.

11. Name of your current solution
12. Current version and date of delivery current version. When was it implemented?
13. Number of users
14. What functionalities are supported within the solution?
15. Are there any automated processes within your current solution?
16. Is the solution integrated with other tools?
17. Aspects that are missing but that are desired
18. Are there any points of attention or bad experiences with the previous implementation project or supplier?

Goal of the project

19. Describe the reason(s) why you are looking for a new CRM system and/or another supplier
20. What do you think you can improve by implementing a new CRM system?
21. What is the goal?
22. How is data and communication with regards to customers and prospects registered and centralized?
23. How does the communication between the office and field staff work? How much time does an employee spend on average per week on administration due to poor communication?
24. How many different people or roles in your organization interact directly with your customers?
25. Is all up-to-date information per customer available in an easy and fast way?
26. Do you consider to make use of new digital channels – website, chat bot, computer telephony …
27. How are marketing campaigns set up and monitored?
28. How is your sales organization set up? Do you have long or short sales cycles? Who is involved?
29. Are you collaborating on customer specific documents? Which teams are involved?
30. How are customer questions, requests and complaints registered and followed up on?
31. Do you provide on site technical support?

QUESTIONS FOR THE SUPPLIER

Basic information

32. What is the name and legal form of your organization?
33. When was your organization founded?
34. How many branches does your organization have?
35. What is the history of your organization?
36. What was the total turnover of your organization in the past fiscal year?
37. How does your organization differentiate itself from the competition? (name 3 unique points, 6 lines maximum per unique point)

Employees

38. How many full-time employees work in your organization?
39. What is the number of employees per location/country?
40. How many employees are involved when it comes to CRM?
41. How do you see the number of employees evolving over the next 3 years?

Solutions

42. Which CRM solutions does your organization offer?
43. What other IT solutions does your organization offer?
44. What is your experience with the integration of CRM and ERP? Name 3 relevant references

Target audience

45. Which industries are you targeting as a company with all solutions?
46. How many customers do you have in those industries?
47. Which of these industries are you specifically targeting with your CRM solution?

QUESTIONS FOR THE SUPPLIER

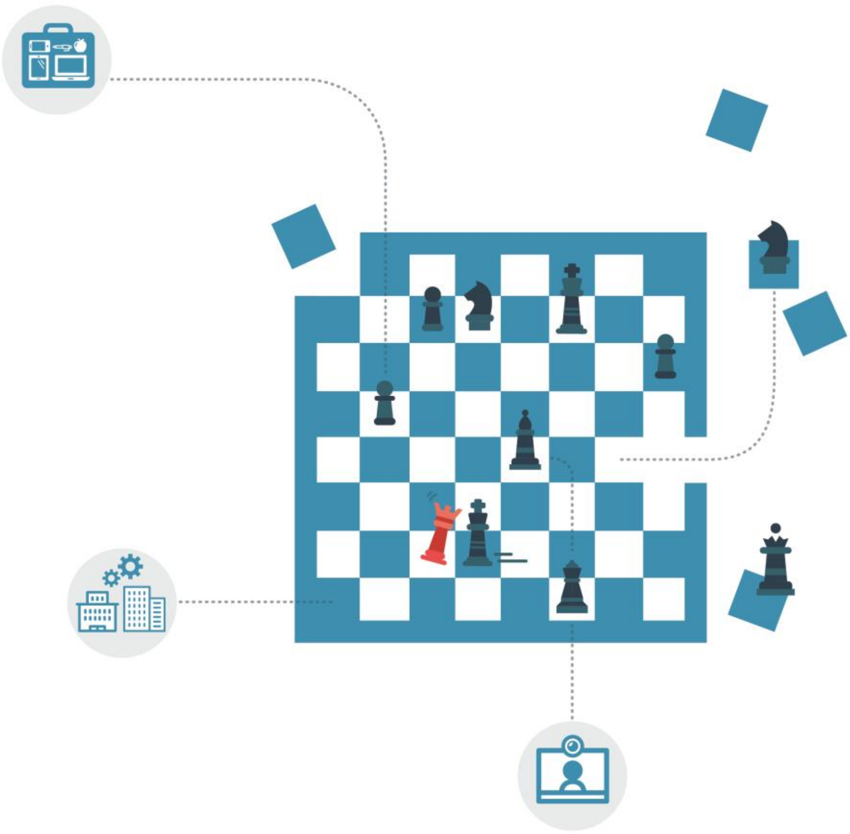
Support

48. Does your organization have its own support department?

49. How many employees work in this department?

50. Which profiles work in this department?

51. On average, how many years of experience do these employees have?



QUESTIONS ON THE SOLUTION

Basic information and versions

52. What is the name of the solution you propose?
53. What version of the solution do you propose?
54. Is this your own solution, or a third-party solution?
55. Which target group are you targeting with this solution?
56. Is the solution available globally and in multiple languages?
57. Do you know the planned release date of future versions?
58. How frequent are new releases released? Are those updates included in the license cost?

References

59. Can you provide a short description of 3 relevant CRM references?
60. How many users do your customers count on average for this one solution?
61. How many users are working with this solution worldwide?

Functionalities

Part 2 of the RFP check list contains a detailed requirements list in which the presence of functions can be surveyed for each domain of the proposed solution.

Consider this requirements list as **a work document that you can extend** if you have specific requirements.

You can ask the supplier to identify which of your requirements are standard within their proposed solution (FIT) and for which requirements customization or development is required (GAP).

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Future proof (R&D)

62. Has your proposed solution evolved in the past 3 years?
63. Is there an (R&D) roadmap? If so, give a brief description.

QUESTIONS ON THE SOLUTION

Security

64. The solution must be secured. How is this guaranteed?
65. Does the online solution comply with EU privacy legislation?
66. Is security provided at the level of user roles?
67. Does the security of the solution support to disable specific functionalities?
68. Is security provided at the level of user groups or teams?

Cloud

69. Is the solution available in the cloud as well as on-premise?
70. What needs to be installed on desktop and mobile clients?
71. How easy is it to integrate with other solutions? Is data exchange possible with other applications?

Integration

74. Can the solution be connected to Microsoft Outlook?
75. Is there a link with Office365, SharePoint Online, Microsoft Teams?
76. Is there a link with document management solutions like Microsoft Teams/Shareoint?
77. Can the solution be integrated with telephony systems? How?
78. Is there an integration possible with ERP systems? If yes, which one?
79. Is it possible to retrieve ERP data (e.g. outstanding invoices, purchase history, etc.) to the CRM solution you offer?

Data migration

80. How can data be migrated or loaded into your solution?
81. How can your solution support data quality and data cleansing?
82. Does your solution support data deduplication?

QUESTIONS ON THE SOLUTION

Mobile

83. What kind of mobile devices and technologies are supported?
84. Can the user fully utilize the CRM solution on smartphones and tablets?
85. Is it possible to work offline with the solution? Are there any limitations?

Reporting

86. How is reporting supported in the proposed solution?
87. Are reports standard available? If so, which reports?
88. Can the customer manage its own reports, charts and dashboards?
89. How does your solution support reports that use multiple data sources? E.g., CRM and ERP.

Usability

90. Can screens be personalized?
91. How can your solution support our company-specific workflows?
92. Can the user interface be adopted to match with our company styling and logo?
93. How can user experience be improved? Can data entry be made simple and easy?
94. How many users worldwide work with your CRM solution?

Licenses

95. What is the pricing structure of the solution? (based on the number, users, modules, devices)
96. What is the base price of the solution?
97. Is it possible to spread the license costs over multiple years?
98. What are the maintenance costs per year?
99. Is there an additional cost for each new release or is it included in the maintenance cost?
100. How is the price of a new release determined, in case it is not included in the maintenance cost?
101. When can the number of users be expanded?

QUESTIONS ON THE PROJECT

Methodology

102. Which method do you use to implement the solution to customers? Specify in maximum 2 pages how this method ensures that:
    - the quality, lead time and costs of the project are controlled.
    - the employees understand the system and want to use it.
    - the quality of the implementation team remains guaranteed.

103. On average, what is the lead time of a total project in terms of delivery time and implementation steps?

104. What effort is required from the customer to meet this timeline?

Education

105. Which training courses do you provide for: management (C level), administrators, key users and end users?

106. Can you provide the training at the customer's premises?

107. Can you provide the training at your location?

108. How much time should the customer provide for training?

Change management

104. What method do you use to ensure a successful adoption of the solution?

105. What effort is required from the customer?

106. Can you support the customer with organizing online events/webinars?

Let's have a coffee

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