

REQUEST FOR INFORMATION

RFI NUMBER:	RFI JW IT 10/10/2024	CLOSING DATE:	17 OCTOBER @16H00
DESCRIPTION:	DESIGN, CONFIGURE, AND IMPLEMENT A CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM FOR JOHANNESBURG WATER. We should be able to manage the system ourselves and shouldn't request technical support. WITH PROFESSIONAL SERVICES FOR A PERIOD OF 36 MONTHS.		
ISSUE DATE	10 OCTOBER 2024		
Submit via Email to:	mapule.setaka@jwater.co.za		

ENQUIRIES MAY BE DIRECTED TO:

Bidding procedure enquiries <u>must</u> be sent to		Technical enquiries must be directed to	
CONTACT PERSON	Mapule Setaka	CONTACT PERSON	Rubens da Silva
TELEPHONE NUMBER	011 688 1574	TELEPHONE NUMBER	011 688 6666
E-MAIL ADDRESS (Submissions must be made to this address)	mapule.setaka@jwater.co.za	E-MAIL ADDRESS	rubens.dasilva@jwater.co.za

SUPPLIER INFORMATION

NAME OF BIDDER			
STREET ADDRESS			
TELEPHONE NUMBER	CODE		NUMBER
CELLPHONE NUMBER			
E-MAIL ADDRESS			
VAT REGISTRATION NUMBER			
CENTRAL SUPPLIER DATABASE No:	MAAA		
MANUFACUTER OR THIRD PARTY (If Applicable)			

1. PURPOSE OF THE REQUEST FOR INFORMATION

Johannesburg Water invites service providers to submit a request for information proposal to design, configure, and implement a Customer Relationship Management system. . This Request for Information is strictly to solicit financial information from potential bidder(s). This Request for Information does not constitute; an offer; or any impression none so ever to do business with Johannesburg Water SOC Limited. The Request for Information response is enquired to assist the organisation with business decision making purposes.

2. BACKGROUND

Johannesburg Water SOC Limited is a Municipal Entity wholly owned by the City of Johannesburg. Its main function is to provide water and sewer services to the residents and customers of the City of Johannesburg. The Customer Relationship Management system is a critical system to support the Entity's operations and optimise the value of its business.

3. SCOPE OF WORK AND SPECIFICATIONS

The implementation of the Customer Relationship Management system is premised around 12 pillars with the intent to provide a complete 360 view of the Entity's customers and enabling increased productivity, automation, and intelligent operations.

The scope of work shall comprise the following:

1. Marketing communication automation.

Customers have different needs, the system must be able to segment customers based on their ward, region, requirements, and preferences, and tailor-fit service campaigns and automate repetitive processes.

2. Customer segmentation.

The Customer Relationship Management system must be able to offer audience segmentation, breaking customers into smaller groups, such as demographics, customer type (e.g. residential or commercial), interaction history, etc.

3. Customer data (database).

The Customer Relationship Management system must have a relational database which collects and stores all customer information, including marketing information, customer interaction history, customer preferences, etc. The Customer Relationship Management system database must be able to accommodate custom fields, e.g. meter readings.

4. Organisation of data, 360 view of customers.

A 360 customer view is a comprehensive and integrated understanding of a customer, their preferences, behaviours, and interactions across multiple channels, systems, and touchpoints. The Customer Relationship Management system must provide a 360 view of a customer with the goal to provide a single, complete, and up-to-date source of truth about each customer. This information can be used to improve customer engagement, customer service, and customer experience. By having a 360 customer view, the Entity can make better informed decisions, personalise customer interactions, and increase customer trust.

5. Customisation.

The Customer Relationship Management system must be customisable to meet Johannesburg Water's business needs. Some customisable features include specialised workflows, custom reports, or dashboards, profiled screens, custom fields explicitly tailored for Utilities, e.g. water meter asset.

6. Customer service (customer portal, chatbots, etc.).

Customer service and experience is an integral part of the Customer Relationship Management system and customer experience. The Customer Relationship Management system must provide the ability to create powerful conversation experience for customers right from within the system such as chatbots, customer portal, and Generative Artificial Intelligence (AI).

7. Third-party integration with other systems.

The Customer Relationship Management system must integrate with other systems to provide a 360 view of a customer and deliver quality customer service, for example Short Messaging Service (SMS), and social media platforms. The system must support industry standard protocols for the exchange of information between systems.

8. Mobile friendly.

The Customer Relationship Management system must be able to deliver a full Customer Relationship Management experience on smartphones, tablets, and other internet-enabled devices. The Customer Relationship Management system must be accessible to management and staff to access and manage key information real time.

9. Analytics and Artificial Intelligence (automation).

Analytics provides contextual insights into customers, consumption patterns, etc. and AI-powered predictions and insights can drive customer engagements directly

in the Customer Relationship Management system. The Customer Relationship Management system must have a built-in analytics and AI engine to drive outcomes and inform next best actions with intelligent recommendations.

10. Employee tracking and task management.

The Customer Relationship Management system must have an employee task management system. View and manage employee tasks and to-dos, get a detailed task list with due dates, priority statuses, and additional notes to get things done on time. Build a repeatable workflow for your team members and schedule activities such as meetings and calls easily. The system must be able to:

- View detailed tasks and to-do lists,
- Track due dates and priority statuses,
- Build custom workflows,
- Assign tasks and schedule meetings and appointments,
- Full audit trail of team activities.

11. Social media analytics and Social CRM.

The Customer Relationship Management system must have an automated social media report tool that collects data from every social media channel: Facebook, YouTube, Instagram, and more. The tool must be able to add key metrics and build a customised social media report template or live dashboard and instantly build graphs to bring customer's data to life.

The system must include Social CRM to make it possible for Johannesburg Water to communicate with its customers through different social media channels, for example, by phone, text, chat, email or social media (e.g. Facebook or Twitter).

Together with Social media analytics and Social CRM, Johannesburg Water can collect richer and actionable insight about customers sentiment about the Entity, its brand, and services.

12. Chat and IP telephony integration.

The Customer Relationship Management system must support integration with IP telephony systems and ability to chat with customers via the telephony platform. VoIP CRM integration combines the capabilities of VoIP and CRM software.

The objective is to enhance communication and information flow between the Entity and its customers, and to foster trust with the citizens of the City of Johannesburg.

The solution must integrate in such a way that when a new customer calls, their details can be automatically linked to the CRM database and information pertaining to the customer is automatically displayed.

4. PRICING SCHEDULE

Prices must include transport, labour, and any other costs.

SCHEDULE A – IMPLEMENT THE CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

#	Description	Estimated Qty	Total Amount
1	Requirements gathering	1	
2	Document preparation: Business Blueprint	1	
3	System configuration including user authorisation	1	
4	Technical development ¹ and integration with 3 rd party systems	1	
5	User Acceptance Testing	1	
6	Training	1	
7	Data take-on (includes cleanup and upload)	1	
8	Deployment and go-live	1	
9	System solution quality check ²	1	
10	Subtotal:	-	

Note. Each milestone must be on a fixed cost and not time and material based. The cost must cover all required resources including Project Management resources and services for the successful delivery of the solution.

1. Not obligatory, subject to Blueprint.

2. Required if the implementation is performed by a certified partner of the Software Developer.

SCHEDULE B – SOFTWARE AS A SERVICE

#	Description	Estimated Qty of Users	Unit Price	Total Amount
1	The Customer Relationship Management system must operate and licensed based on a Software as a Service model. This includes any software maintenance, updates and bug fixing.	158		
2	Subtotal:	-	-	

SCHEDULE C – PROVIDE SUPPORT FOR THE CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

#	Description	Total Amount
1	Provide support for the Customer Relationship Management system – Year One	
2	Provide support for the Customer Relationship Management system – Year Two	
3	Provide support for the Customer Relationship Management system – Year Three	
4	Subtotal:	-

Note. Support for the system will commence once the CRM system has been fully implemented and signed-off.

SCHEDULE D – PROVIDE TRAINING FOR THE CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

#	Description	Estimated Qty	Unit Price	Total Amount
1	Provide training on the Customer Relationship Management system.	158		
2	Subtotal:	-	-	

SCHEDULE E – PROVIDE PROFESSIONAL SERVICES OVER THE DURATION OF THE CONTRACT

Professional services cover billable services to support new functionality as and when required by business, for example new reports. The billable services fall outside of schedules A, B, C, and D. The unit price must be based on a flat hourly rate.

#	Description	Unit Price
1	Provide professional services Year One	
2	Provide professional services Year Two	
3	Provide professional services Year Three	
4	Subtotal:	-

5. SUPPLIER COMPANY DETAILS

Suppliers to complete the below according to their company details.

INFORMATION FOR SPECIFIC GOALS ANALYSIS	
BUSINESS OWNED BY 51% OR MORE -BLACK PEOPLE	
1. Percentage (%) of Black Ownership)	
2. Is Black Ownership 51% or more? (Yes or No)	
BUSINESS OWNED BY 51% OR MORE – BLACK YOUTH	
3. Percentage (%) of Ownership by Black Youth	
4. Is the percentage of Black Youth Ownership 51 % or more? (Yes or No)	
BUSINESS OWNED BY 51% OR MORE-WOMEN	
5. Percentage (%) of Ownership by People who are Women	
6. Is the percentage of People who are Women 51 % or more? (Yes or No)	
BUSINESSES LOCATED WITHIN THE BOUNDARIES OF A REGION IN COJ, COJ MUNICIPALITY OR IN GAUTENG PROVINCE	
7. Is your business located in the Gauteng Province? (Yes or No)	
8. Is your business located in the COJ Municipality? (Yes or No)	
9. Is your business located within the region of the COJ? (Yes or No)	
BUSINESS OWNED BY 51% OR MORE - BLACK PEOPLE WHO ARE MILITARY VETERANS	
10. Percentage (%) of Ownership by Black People Who Are Military Veterans	
11. Is the percentage of Ownership by Black People Who Are Military Veterans 51% or more? (Yes or No)	
BUSINESS OWNED BY 51% OR MORE-BLACK PEOPLE WITH DISABILITIES	
12. Percentage (%) of Ownership by Black People With Disabilities	
13. Is the percentage of Ownership by Black People with Disabilities 51% or more? (Yes or No)	
SMME (AN EME OR QSE) OWNED BY 51% OR MORE - BLACK PEOPLE	
14. What is the Enterprise Type? EME – turnover is less than R10m QSE – Turnover between R10m and R50m	

Generic – Turnover is R50M of more	
JOINT VENTURE (JV), CONSORTIUM OR EQUIVALENT	
15. What is the percentage (%) of ownership for each party?	
SUBCONTRACTING WITH COMPANIES AT LEAST 51% OWNED BY HISTORICALLY DISADVANTAGED INDIVIDUAL (HDI) GROUPS MENTIONED ABOVE	
16. What is the percentage (%) that will be sub-contracted to companies that are at least 51% owned by Historically Disadvantaged Individual (HDI) groups mentioned above?	

6. INFORMATION PRICE BREAKDOWN

DESCRIPTION	BREAKDOWN IN PERCENTAGE	APPLICABLE INDEX	IMPACTED BY ROE (YES/NO)
Raw materials			
Direct Labour			
Direct Overheads			
Transport			
Indirect Labour			
Indirect Overheads			

Total	100%		

provide the following information (if Applicable)

TYPICAL PRICE ADJUSTMENT FORMULA INCLUDING INTERVALS

SUBMITTED DOCUMENTATION IN SUPPORT OF A REQUEST FOR A PRICE ADJUSTMENT

SOURCE OF RAW MATERIAL	
DESCRIPTION	COUNTRY OF ORIGIN
Raw materials	

ASSOCIATED RISKS	
RISK CATEGORY	RISK MITIGATION
Economic:	
Security of Supply	
Supply and Demand	
Rate of Exchange	
Operational:	
Capacity	
Logistics	