



27 April 2022

Reference: RFP 2022/011 (hn)

ADDENDUM NO. 1

Request for Proposal no. RFP 2022/011 – Implementation of Green Climate Fund’s Constituents Relationship Management (CRM) System and Related Processes

This Addendum no. 1 is issued to complement and will constitute integral part of the Request for Proposals. The original Request for Proposals Document will remain in full force and effect. Respondents shall take this Addendum into consideration when preparing and submitting their proposals.

1. GCF responses to clarifications from Bidder

| Item # | Section | Question from Vendor | Answer from GCF |
|---------------|-------------------|---|--|
| #1 | 5.0 Deliverables | What deliverables do you consider as essential for a delivery of an MVP? Could we help advise on the prioritization of the deliverables based on our industry knowledge and CRM leading practices? | Yes, we expect an agile and collaborative approach to prioritization. See #17 below regarding MVP deliverables. |
| #2 | 5.0 Deliverables | Could we group some deliverables by work phase for a common pricing while ensuring that it makes sense holistically for GCF? | Deliverables are grouped into 4 phases in the RFP. The vendor can suggest a different grouping with explanation. |
| #3 | 5.0 Deliverables | Typically, Hyper Care period is around 3 months to get a stabilized CRM system. Could you share the specific reasons why you need a Hyper Care plan for 6 months? | The vendor may provide options for 3 and 6 months Hyper Care. The proposed 6 months is to allow for change management, based on the digital maturity and adoption of the Fund. See also #5 below. |
| #4 | 5.0 Deliverables | What training materials would you consider as a minimum as part of an MVP? Can we advise based on our Change Management leading practices? | We consider recorded walk-through training essential, with hands-on practice desirable. Supporting documentation in the form of knowledge base articles can reference standard documentation for out-of-the-box features, with processes and features specific to GCF clearly presented. Additional training materials may be suggested in the proposal. |
| #5 | 5.0 Deliverables | Can training be conducted after the delivery date? Or can some critical training portion be conducted before and the rest after delivery based upon what our Change Management practices would recommend? | Yes, this is included under Hyper Care - Additional trainings, as needed - and expected to take place by end 2022. |
| #6 | 2.2 Data Cleaning | Can you please provide examples of the data that will be cleansed? It is mentioned "spreadsheets" and other sources. Would it be possible to send a sample of what the format/file look like or describe it more in details? This is for us to seize the quality of the data. | Data cleaning for the CRM MVP has started and may complete before this RFP, so time and material pricing is appropriate for the data cleaning scope. It is included because completion is essential for delivery on 30 June. |



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| #7 | 2.2 Data Cleaning | Data migration is in-scope. What are the types of data and "programs" that the data will be coming from? Would it be possible to extract data from these programs? We would need to know the name of the programs and the data it contains. | Migration of SharePoint Online documents related to CRM contacts and accounts is in scope, although integration of existing SharePoint Online locations is preferred. Contact lists in Excel files should also be migrated. CRM processes developed with the vendor will migrate processes from GCF's existing productivity tools, from which data can be extracted in Excel format. Identifying and defining the as-is and to-be processes and relevant data to migrate is key during the Inception and Development phases, respectively. |
| #8 | 2.2 Data Cleaning | Will GCF have capacity to assist with this process? We will assume that a GCF personnel commits time/effort in the data cleaning process along with the vendor to ensure the new data set stays relevant to what the process and business require. | Yes, in line with #6 above, we understand that GCF participation in data cleaning will reduce the cost of data cleaning by the vendor. |
| #9 | 2.2 Data Cleaning | For the data cleaning scope, can we provide pricing based on a time and material? We can explore fixed pricing when we have a view of the data set involved. | Yes, see #6 above. |
| #10 | 2.3 Data Integration | What information from "other systems" will need to flow into the CRM? We need to understand which systems and the number of systems that need to be integrated. | As for data cleaning, integration between MS Dynamics and GCF's other systems via our data hub has started and may complete before this RFP, so time and material pricing is appropriate for the data integration scope. It is included because completion is essential for delivery on 30 June. |
| #11 | 2.3 Data Integration | Since this is two-way integration, what data needs to go from/to CRM to other systems? | In this RFP, integration concerns CRM contacts and accounts. |
| #12 | 2.3 Data Integration | Do these other systems have APIs that we can connect to? If yes, can you provide details of the APIs, else we will need to assess whether those APIs are available. | Yes, we can provide API and connection details. |
| #13 | 2.3 Data Integration | For the data integration scope, can we provide pricing based on a time and material? We can explore fixed pricing when we have a view of the integration requirements involved. | Yes, time and material pricing is appropriate for the data integration scope. |



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| #14 | 4.0 Scope of the Services | Can you please provide any definitions or details for the enhanced visualizations and reports you expect to see? Could we assume the reports will be out of the box? | Reports should cover core areas including activities, opportunities, sales processes, tasks, and CRM utilization, with filtering appropriate to the user role. The vendor should combine out-of-the-box reports where possible with custom such as Power BI or Tableau, which is GCF's main visualization platform. The relationship map visualization should provide an interactive view of linked accounts and contacts, including grouping, aggregation and drill-down. This is compatible with the use of a library such as PCF network graph. |
| #15 | 6.0 Timeline | It is mentioned "tentative dates" on the 30-June. Would it be fair to assume that GCF is expecting a minimum viable CRM with the must-have functionalities which the vendor can suggest based on the priority use cases in the RFP and adopt a phased approach for the nice/good to have functionalities? | Yes, see #17 below. |
| #16 | Other | The whole project can be carried out remotely. Would you expect the vendor's personnel to travel? | Remote work is fine. Hours compatible with Korea Standard Time are appreciated. |
| #17 | Other | Can we do this project in a phased approach with a MVP (minimum viable product) of CRM delivered on 30 June? | The work described is indeed to finish MVP of CRM delivered on 30 June. We expect extension and enhancement of the CRM system to additional teams, data, and processes, which is to be planned based on the success of this initial project. |
| #18 | Other | Do you have an existing Azure DevOps or Jira instance that we can use to manage the project? Else we will procure it with respective fees we will disclose to GCF as optional. | We have Microsoft Planner and also ServiceNow visual task boards available as needed. Other recommended system can be priced as an option. |

Please take note.

Procurement Unit, Division of Support Services (DSS)
Green Climate Fund