



REFERENCE NUMBER: [LADDER004]

## RESEARCH: SYSTEM GAP ANALYSIS

ESF.04.159 - 'Leading and Delivering Dialogue Effectively, Representatively (LADDER)'

**ISSUED ON: 14/03/2021**

**DEADLINE: 24/03/2021 (NOON)**

**Malta Chamber for SMEs**

Dar Anthony Gixti, 43/45, Triq il-Kapuccini, Floriana, FRN 1052

+356 21232881

[abigail.mamo@smechamber.mt](mailto:abigail.mamo@smechamber.mt)

## 1. Background information

Malta Chamber of SMEs (hereinafter the '**SME Chamber**'), is the main representative for micro, small and medium businesses in Malta. The SME Chamber represents a wide variety of economic sectors of different sizes. Malta Chamber of SMEs was founded 70 years ago as an organisation dedicated to defending the rights of small retailers. Nowadays, the SME Chamber has grown to include all economic operators representing all economic sectors. Throughout the years, Malta Chamber of SMEs has upgraded their status to that of a social partner, and are now recognised as an employers' body and is one of the most important and biggest interest groups in Malta. A non-political organisation, the SME Chamber works to ensure mutual cooperation with the relevant authorities.

The project in general is a comprehensive effort to improve the output of social dialogue. Being an organisation that has been in the work of social dialogue since its inception, over 70 years, we have now wide experience and a proven track record that ours is a true vocation and that our organisation and its employees have a calling for this social field. This is evidenced not just by past projects that have been implemented but also by all the activities the organisation carries out.

The only direction the organisation can now take in order to improve the current situation in terms of strengthening its network and having a more effective social dialogue is to complement a reform into our systems that is accompanied by a human development strategy. Simply adding on resources is not wise since the service will become unsustainable and working more of current staff would not be possible since they have reached their maximum capacity. What is required now is to make space and complement the capabilities of the employees by giving them the tools they dearly need to work with and train them to use them proficiently. Once this takes place, staff members will be in a position to also continue their development and investment in skills beyond this as now they will be allowed the space to do so.

The SME Chamber is seeking to upgrade its IT facilities when it comes to engagement with members through the development of an appropriate Client Relationship Management ('**CRM**') system, in order to improve interaction and relations with the organisations' members and beyond. As such, the SME Chamber is seeking to procure the development of a state-of-the-art CRM system that would be built on a membership model. The development of such system will be done following the Issue of a separate "Request for Tenders - Member Management System."

Before selected the appropriate CRM system, the SME Chamber will engage the services of a proficient service provider, through this "Call for quotations - System Gap Analysis", in order to carry out a system gap analysis based on the needs and objectives of the entity and



Operational Programme II – European Structural and Investment Funds 2014-2020  
*"Investing in human capital to create more opportunities and promote the well-being of society"*

Project part-financed by the European Social Fund  
Co-financing rate: 80% European Union Funds; 20% National Funds



translate any findings from such system gap analysis in a technical statement of requirements to be included in the tender document for the procurement of the CRM system.

The aim of this call for quotation, is to ensure that the system gap analysis carried out pursuant to this call for quotation contributes such that the project reaches its full potential from a technical efficiency and sustainability point of view. This will be a very important step that will take all the gaps identified in the organisation in terms of shortage in capacity to reach and engage with the target group and technically translating this need into the work that will take place to fulfil the gap with the defined outcome as already explained.

This is being done through a project called ESF.04.159 - 'Leading and Delivering Dialogue Effectively, Representatively (LADDER)' – a project part-financed by the European Union in accordance with the rules of the European Social fund 2014 – 2020, Operational Programme II.

## **2. Dates**

Interested parties are to submit their quotation by **24<sup>th</sup> March 2021 at 12:00pm**. Quotations and any supporting documentation should be sent either by hand or by email. Contact details can be found under section 11 below.

The deadline for the selected contractor to complete the systems gap analysis is the **end of Q2 2021**, unless otherwise agreed with the consent of the SME Chamber.

## **3. Current Systems**

Currently, the entire system operated by the SME Chamber is based on the use of the following services:

- Microsoft Access members database
- WordPress-based website with member login facility and memberpress
- Microsoft 365 email service

The above are operated by 8 staff members and a total of 10 users.

## **4. Objectives of the Research**

As part of its long-term growth strategy, the SME Chamber is currently seeking to procure the development of a state-of-the-art CRM system built on a membership model. The ultimate aim is for the SME Chamber to increase member interaction and thus increasing social dialogue.

The system should be able to integrated with the main communication channels in order to give SME Chamber's employees full visibility and enabled facilities for interaction with members. Systems implemented within the CRM system should be as automated as possible and should include the following:

- Database facility with numerous fields and advanced search facility;
- Record of services provided to, and utilized by each individual member;
- Visibility of interest of members and recorded interactions;
- Ticketing Management System and tracking system;
- Overall data collection facility - statistics - analytics;
- Mass mailer and mass messaging systems;
- Surveying system (Questionnaires) with results aggregation and unique tokens and with the possibility to send it to members coming from specific sectors;
- User based system with different levels of access
- Web-based and interoperability features so that the system is accessible through different devices and operating systems including (but not limited to; MacOS, Windows, iPadOS and Android);
- CRM Strategy – Artificial Intelligence
- Procurement approval processes;
- Visualisation - Data integration - Data Management;
- Identification requirements as well as suggestions on how members can become the central focus of all the organisations' processes and applications that will handle the current and future needs of the organisations' members.

## **5. Specific Provisions**

The following deliverables shall be required from the selected contractor:

- Attendance to an introductory meeting with the management team;
- Attendance to at least two (2) consultation meetings with the team including all staff members;
- Conducting at least a ten (10) day requirements-gathering exercise to identify, visualise and construe the current membership processes, including the typical journey members pass through when interacting with the SME Chamber and relevant key stages.
- A detailed report which must include the detailed technical specifications that the SME Chamber will expect to be delivered by the contractor selected to supply the CRM system whic report shall be provided in an advanced state of readiness such that it can be readily included in the tender - 'Request for Tenders - Member Management System'. As part of the report, the contractor will be required to provide the SME Chamber with a list of current and future requirements which can also be used as a basis for a tender document in case you need to take such an

approach. The report must include solution design principles underpinning the requirements for the CRM system as proposed by the selected contractor, strategic requirements, functional requirements and technical requirements. The report should also include recommendations for solution delivery, management and maintenance parameters.

- Allocation of one (1) Technical person to sit on the selection committee appointed by the SME Chamber for the 'Request for Tenders - Member Management System' (selected technical person shall be required to attend at least 1 meeting or more depending on selection exigencies.)

## 6. Eligibility

- Individuals Qualification in technical competence - MQF level 5
- Experience in IT business Advisory - facilitating IT business solutions with a minimum experience of ten (10) years in the field

## 7. Award Criteria

Responses to this call for quotation are to be straightforward, clear, concise and limited to the information requested.

In order for submissions to be considered complete, Economic Operators must provide all the requested information mentioned in this document as well as any other documentation, comments, observations or suggestions which potentially may assist the SME Chamber in the call for Quotation and which are over and above the financial offer submitted.

The award criteria for this Call for Quotations is the **cheapest technically compliant offer.**

Once the bidder is awarded (based on the above point), bidders are given the opportunity to file a notice of objection with the Review Board/Appeals Board within five (05) calendar days from the date of notification.

Service providers which get awarded the 'Call for Quotations - System Gap Analysis' will not be eligible to participate in the 'Request for Tenders - Member Management System.

## 8. Payments

Payment 1 - 50%	50% Payment will be made against an invoice following the signing of the contract. Invoice is to be presented to SME Chamber not later than 30 days following signature.
Payment 2 – 50%	Remaining amount (50%) will be made against an invoice presented together with the submission of a report detailing the above requested information and specifications. Invoice is to be presented to SME Chamber not later than 30 days following report submission.

## 9. Financing

The project is part-financed by the European Union in accordance with the rules of the European Social fund 2014 – 2020, Operational Programme II.

## 10. Other terms and conditions

The SME Chamber reserves the right to ask for any amendments and make changes to the agreed provisions, as it deems fit. This is to ensure that the expected objectives and results are met.

The SME Chamber is entitled to suspend the performance of the service and supply or any part thereof for such time and in such manner as it may consider necessary, without thereby incurring any damages.

Where the award procedure or execution of the agreement is vitiated by substantial errors or irregularities or by fraud, shall suspend execution of the agreement.

Where such errors, irregularities or fraud are attributable to the service provider, the SME Chamber may in addition refuse to make payments or may recover amounts already paid, in proportion to the seriousness of the errors, irregularities or fraud.

The suspension of the agreement is intended to allow the SME Chamber to verify whether presumed substantial errors or irregularities or fraud have actually occurred. If they are not confirmed, execution of the agreement shall resume as soon as possible.

The Supplier is to ensure that all services, documentation and through this procurement process comply with the requirements of the Equal Opportunities Acts of 2000.

Should you require any additional information regarding the call for quotation, please submit your queries by 18th March 2021. Details of the contracting authority can be found below.

## 11. Details of Contracting Authority

<b>Name</b>	Abigail Mamo
<b>Designation</b>	Project Leader
<b>Address</b>	Dar Anthony Gixti 43/45 Triq il-Kappuccini Floriana FRN 1052
<b>Email</b>	abigail.mamo@smechamber.mt

## 12. Financial Offer

<b>Supplier's details:</b>	
Company's name:	
Contact person's name and surname:	
Company's Address:	
Telephone number:	
Email Address:	

Requirements	Specify if requirement can be met  Yes / No	Please add further comments/ description	Provision Total Cost including Taxes/Charges, other Duties & Discounts but <u>Exclusive of VAT (Delivered Duty Paid -</u>

Clause 5 a) <b>Specific provisions</b> – All requisites as specified under this provision.			€
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**Total cost of service (in Euro) as per above:**

<b>Net:</b>	€
<b>Any discount: (specify rate if any)</b>	€
<b>Vat (specify rate if any):</b>	€
<b>Total:</b>	€

Date:

Signature: