Clarifications V2 – LADDER006 as at 24/09/21

Published on 23/09/21

1. **Answer:** Duration of the contract can be found under Section 3 - Article 18 - Execution of the Contract. The initial period of commitment would be that of 1 full year subscription (if applicable) with the intention being of maintaining the subscription for the years to come. This said the initial subscription covered by the contract is that of 1 year.

   In this case the performance guarantee will cover a % of the global price i.e development global price, 200 hours assistance, training costs and an annual subscription (if applicable).

2. **Question:** We found a number of forms required, but not provided for in the documentation:

   a. Declaration Concerning Exclusion Grounds – Form
   b. Declaration Concerning Selection Criteria – Form
   c. Key Expert Form
   d. Exclusivity and Availability Form (Completed for each Key Expert)
   e. Tender Requirement Specification Conformity Form

   Most of the above forms can be sourced from the Government tender's site (or made available from previous Government tender documentation), so just to confirm that it is OK for us to source these forms? The only one we are not sure about is the last one (e); could you please provide this or guide us where to pick this up.

2. **Answer:** The above-mentioned forms are in fact included in the zip folder through this hyperlink: https://bit.ly/LADDER006. These can be found under each folder e.g., Declaration Concerning Exclusion Grounds – Form can be found under folder titled - Selection criteria or Tender Requirement Specification Conformity Form can be found under folder titled - technical specifications. Should you encounter issues accessing them, kindly send an email to admin@smechamber.mt in order to receive them via email.

   UPDATED on 24/09/2021

3. **Question:** Could you please elaborate 2.3 "6. Having the facility to promote professional services and invoice for such service." Eg. What type of services, who are providing such services, how is the invoicing process?
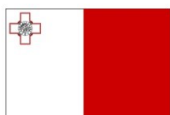
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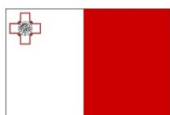Project part-financed by the European Social Fund
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3. **Answer:** *The system must be able to promote any services such as professional service provided by the Malta Chamber of SMEs, the system must be able generate invoices such services to the clients and members. This is a Sales Process, which invoices sending the quote and invoice for the service provided. As an example one service would be that of submitting micro invest applications on behalf of members.*

4. **Question:** In "7. Having a mass mailing and mass messaging solution that can group selected targets/sectors to relay any type of information." With regards to messaging solutions and apart from WhatsApp, Is there any other messaging solution expected?

4. **Answer:** The most important is the mass mailing via email, the user must be able to generate the targeted members or leads with certain selection criteria to target particular sectors or groups. Mass messaging solution must as well be provided giving the facility to send to the selected targets via phone message (SMS) and including WhatsApp messages, as mentioned in technical requirements.

5. **Question:** In "11. Having a Membership Management system that can help the organization grow and make decisions with an intelligent reporting suggestion on the data collated using Artificial Intelligence." what kind of AI suggestions are expected?

5. **Answer:** The Solution must have the capability to suggest with the virtue of the history of the data compiled and member interaction over the years, for example suggest the target segment that must be targeted in view of the current situation, or in view of lack of activity on these particular segments and so on.

6. **Question:** In "14. Having an Events management facility to be able to create, manage, coordinate jobs, register attendees and follow-up, tracking and monitor each status giving statistical results for each stage." Would it be possible to have examples of the type of jobs to coordinate and any process required?

6. **Answer:** *Jobs that have to be allocated to each Malta Chamber of SMEs employee for the preparation of the event, for example ; preparation of tags, booking of venue, selection of catering, preparation of the agenda, contact the speakers and other logistics. This will include a to do list to organise such an event and allocate jobs to each individual.*

The Process required would be when the invitations for the event are sent or when the event is made public and registrations are open. The activity of the registration on the members or the lead such as sending the invitation > registering > if not member possibility to send to membership process >

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if member send agenda > registration of attending > follow-up (which might include sending presentations). This is just a simple example, further evaluated processes will be discussed upon the scope of the implementation process.

7. **Question:** In Annex 2 "Ensures that a user profile cannot be logged in more than once at a time" Are you referring to a mechanism that avoids the creation of duplicated member user profiles? Or Are you referring to concurrent users?

7. **Answer:** *To avoid the creation of duplicated members using the same profile.*

8. **Question:** In Annex 2 "Minimum of 8 users with different roles and permission levels:

- Accounts 1 users CRM Membership full permission 3 users

- CRM Membership limited permission 8 users (including the Accounts user)"

In order to provide an accurate and competitive licensing price, it is very important to have further visibility of the number of users that will be required across the functional components

Eg. User 1 will:

a) Manage cases (read only / read & write / this user does not need access to this component)
b) Membership Management system (read only / read & write / this user does not need access to this component)
c) Mass emailing
d) Survey management facility
e) Events management facility
f) Financial system

User 2 will….

8. **Answer:** The below table illustrates an example of how permissions will be assigned.
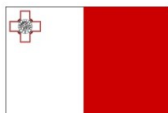
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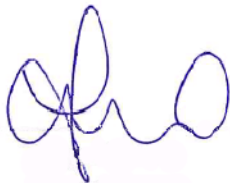| Users	1	2	3	4	5	6	7	8
Finance	F	N	R	N	R	R	R	N
Procurement	F	F	F	F	F	F	F	N
CRM / Members	R	F	F	R	F	R	R	R
Marketing	F	F	F	R	F	F	F	R
Sales & Invoicing	F	F	F	R	F	F	F	N
Manage cases	F	F	F	F	F	F	F	R
Mass mailing/messaging	R	F	F	R	F	F	F	R
Surveys	R	R	R	R	F	F	F	R
Events	R	R	R	R	F	F	F	R

F - Full permission read and write
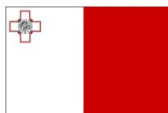**R - Read permission only**
N -No access

Note 1: The software is expected to have different levels of permission criterias within each user, such as not having the access to delete any data or extract (export) any data as per technical requirements.

Note 2: The above permissions will be finalised during the workshops conducted as part of this tender - Activity 2 of the Terms of Reference

Note 3: Admin rights must be provided in-house as stated in technical requirement Annex 2 – Technical Requirements in the Generic section

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