Requestion for Quotation Response
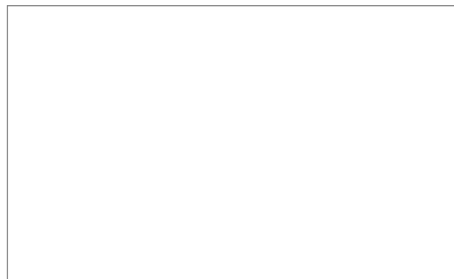
Juliana Project

34 Soft Interactive Pvt Ltd

E 196 Phase 8B Industrial Area

Mohali, Punjab, 160055

01 October 2014

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1. About this document

This document is provided as the Request for Quotation (RFQ) response format associated with the Juliana Project that will be run by 34 Soft Interactive Pvt Ltd.

Do not respond to this document before you have thoroughly read and understood the associated Request for Quotation (RFQ) document.

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Project pricing

Authorisation

2. Your RFQ Response

About your organisation

Please provide a brief overview of your organisation covering its history, current and high profile projects, locations and any other information you feel it relevant. This is provided for information only, there will be further opportunity to present your organisations credentials in the next step.

Introduce your team

Please list your key team members including identifying those that would be involved with the project and their roles.

Name	Position	Project Role	Contact details	Comments

Additional notes & credentials

Please provide any additional information that you feel will best present your case for winning the selection process and delivering our project.

Reference projects

Please provide a list of (up to five) similar projects that we can review as a reference to get a better understanding of your work and outcomes.

Project name	Client name	Notes & Comments

Your referees, references clients or sites

Please provide three references that we may contact to ask about their experience with your products and service. Please ensure that each person is informed that we may be contacting them.

Client name	Contact name	Preferred contact method

3. Features and functions compliance

Please complete the table below indicating if your system provides the features and functions that we require.

Fully Scoped Functional areas are as below:

Membership management

Members are the lifeblood of the organisation, delivering services to them and enhancing their lives is a key priority. Membership Management is therefore an essential function for Associations and many other other non-profits groups.

 The level of functionality required to support the management of your membership data and membership interactions will vary with the complexity of your membership structures and the overall level of automation and interaction you require.

 Closely tracking and growing membership numbers is often a primary goal and key revenue generator, so storing and (quickly and flexibly) accessing information on them is essential.

 Key Membership Management features include:
 - Membership cycles can be defined (calendar year, pro-rater etc)
 - Membership levels and pricing can be configured
 - Membership reporting tools

Functional area Line items

Feature name	Importance	Fully complies	Partly complies	Work around required	Does not comply
Membership pricing can be configured including early bird discounts, joining fee, late fee	Nice to have				

Any notes or comments

Membership renewal

Allowing members to renew through your website in a simple and intuitive way will also create significant cost savings.

 It also represents improved service and convenience to many who are happy using the internet to make payments. It allows members to renew any hour of the day or night from anywhere. This convenience can be the difference between the renewal and a lapsed member.

 Key features include:
 - Automated notifications of membership expiry
 - Members can modify their membership types, interests and settings
 - Online payments processed for renewals

Functional area Line items

Feature name	Importance	Fully complies	Partly complies	Work around required	Does not comply
Automated communications to member through renewal workflow are supported -e.g. renewal reminder, renewal acknowledgement	Nice to have				

Any notes or comments

Marketing Communications

Moving your communications from the traditional posting of letters also represents significant savings and flexibility. Many organisations are in-fact being pushed by there members and constituents to stop sending letters, in preference to email.

Whilst for many the transition from letters to email can take some time, even moving 50% of your communications will save money and benefit the environment. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.

Key features include:
- Newsletters (as well as notifications to individuals) can be sent from the system
- Subsets of database can be chosen based on a range of profile information and/or custom segments
- Statistics are available to allow analysis of success of communication

Functional area Line items

Feature name	Importance	Fully complies	Partly complies	Work around required	Does not comply
Both members can non-members can be targeted	Nice to have				

Any notes or comments

Events Registration

The management of events is a common activity and therefore requirement for Associations and non-profit systems. Its automation often represents dramatic savings because of the high level of manual processing required for each ticket and attendee for every event.

 A list of functional line items relating to Event Registration are provided below for you to include or exclude and to provide a ranking of importance for your project.

 Key features include:

 - Events can be quickly and easily published onto the website
 - Members receive different event pricing to non-members
 - Registrants can purchase tickets to all events in a suite of events or purchase in groups

Functional area Line items

Feature name	Importance	Fully complies	Partly complies	Work around required	Does not comply
Events can be quicklyand easily published onto the website	Nice to have				

Any notes or comments

Event Administration

The 'back-office' activities required when running an event can be extensive and time consuming. Many however can be automated to some extent, which represents a significant saving of time and money.

 Key features include:

- Seating allocation can be done automatically but with manual override as required
- Name tags can be automatically generated for event
- Follow up emails can be sent to both attendees and non-attendees after event

Functional area Line items

Feature name	Importance	Fully complies	Partly complies	Work around required	Does not comply
The details to be captured for an event can be configured and presented to the end user in a consistent layout	Nice to have				

Any notes or comments

Continuing Professional Development

Many Associations focus on assisting in improve industry standards by providing, monitoring and rewarding members for undertaking ongoing professional development activities.

The steps and actions required to be taken by members in this process vary between industries, but many are based on points systems that require tracking. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.

Key features include:

- CPD goals and points can be set-up flexibility in the system
- Members can be prevented from renewing their membership if CPD goal(s) have not been

met
 - Members can track and manage their own CPD record e.g. to add external activities that qualify for CPD recognition

Functional area Line items

Feature name	Importance	Fully complies	Partly complies	Work around required	Does not comply
Any number of different CPD goals can be defined to reflect different requirements for different types of members	Nice to have				

Any notes or comments

Resource Library

Many membership organisations have accumulated a considerable library of resources that need to be readily accessible to either to the public or, more often, available only to members as a benefit of membership.

 The usefulness of this library is predicated on it being easily browsed or filtered via a variety of meta data relevant to the resources and their application.

 Key features include:

 - Resources within the resource library can be publicly available or restricted to members
 - Metadata to be assigned to resources can be configured

- The resource library can be browsed by category or search/filtered by metadata

Functional area Line items

Feature name	Importance	Fully complies	Partly complies	Work around required	Does not comply
Resources within the resource library can be publicly available or restricted to members	Nice to have				

Any notes or comments

Response types are:

- **Fully complies:** Your system has a feature that directly meets the stated requirement, and its intended use.

- **Partly complies:** Your system has feature(s) that partly meet the functional requirement, but not entirely.

- **Work around required:** Your system does not have feature(s) that meet the functional requirement, but a simple manual work around could be used.

- **Does not comply:** Your system does not comply and a manual work around is not realistic.

Any other response labels used will be judged 'Does not comply'.

4. Process and pricing

Process and milestones

Please outline your project delivery process, including the primary steps and any dependencies. You may wish to describe the benefits of your process, including why your process is successful and/or matches our timelines and milestones, and how it reduces risk.

Pricing

Please outline all cost areas, including (but not limited to):

- Project implementation fees based on requirements provided

- Ongoing fees and maintenance

- Licence fees

- Transaction fees

- Add-on fees

- Third party fees

Please match your fees to the project milestones and deliverables as far as possible. Where a fixed quote cannot be provided please provide an estimate range.

Project pricing

Please document your quotation for delivery of the platform / solution.

Fees for services / project delivery

Project phase / milestone	Fee (including tax)	Notes & Comments

Technology / licence fees

Please document any licence or technology fees that apply.

Description	Fee	Once off / yearly / monthly

Third party fees

If your solution requires any fees be paid by us to a third party please detail these below.

Description	Fee	Once off / yearly / monthly

Other details

Please provide any other details regarding pricing please do so below.

Please also provide the hourly rates for key team members or project roles.

Role / name	Rate	Notes

Please describe your desired payment terms.

5. Authorisation

Please authorise your quote.

By signing below you are submitting your quotation, and saying that it is complete and accurate. You agree that you are committing your organisation to delivering the product and services as documented here and have the authority to do so.

Full Name	Position