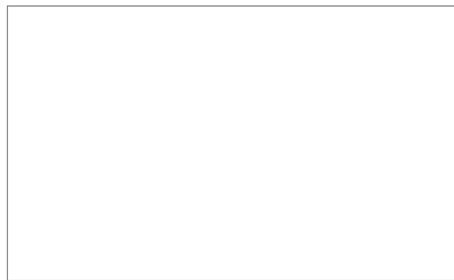


Request for Quotation

Juliana Project



34 Soft Interactive Pvt Ltd

E 196 Phase 8B Industrial Area

Mohali, Punjab, 160055

01 October 2014

Vivek Mahajan

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1. Executive summary

About this document

This document has been created to brief you and your organisation on our upcoming project and to gather detailed information on how your organisation and technology platform can deliver our requirements.

The document contains background information about 34 Soft Interactive Pvt Ltd, our mission and the project objectives. It also details the functionality that we wish the project and platform to support.

Project Scope

The full project scope contains functional areas and features within each of these functional areas. Each of the features can present operational improvements, or benefits to stakeholders. A breakdown of these [features and functions is provided below](#).

In total there are 93 desired features, broken into 7 Functional areas or groups.

In this project we wish to implement the following high level functional areas:

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

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

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

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

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

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

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

Project Timeline

The project duration is expected to be **25** days.

- The intended start date is: **04 September 2014**
- The target completion date is: **29 September 2014**

2. About 34 Soft Interactive Pvt Ltd

Our mission

fdsfds

Our short / medium term goals

jhgjh

3. Project objectives and benefits

Introduction

This section presents the motivations for the project. These include project our objectives, how these fit with our organisational strategy and other benefits.

The projects contribution to our organisations mission

bnmnbmbn

The projects contribution to our organisations current goals

bnmbnm

4. Roles and Responsibilities

Successful execution of the project will require the input and participation of a number of team members, these are listed below along with their anticipated roles and responsibilities.

Our project team

The project team leader is Vivek Mahajan.

Team member	Role (title)
Vivek Mahajan	dfdf
Kimti	dfdsfds

5. Process and timelines

We are expecting the project to be delivered during the following period, the project is broken into key milestones shown:

Timeline & milestones

The project duration is expected to be **25** days.

- The intended start date is: **04 September 2014**
- The target completion date is: **29 September 2014**

The project will include key milestones, these will help us monitor and keep the project on time and budget. The milestones are not finalised, but are likely to include:

Milestone name	Date
1: Project Commencement	04 September 2014
2: Supplier engaged	12 September 2014
3: Scoping and planning complete	15 September 2014
4: Interface design complete	18 September 2014
5: Development complete	21 September 2014
6: User testing complete	24 September 2014
7: Training complete and system live	27 September 2014
8: Project Completion	29 September 2014

6. Evaluation criteria

Your response will be evaluated on the following criteria in priority order:

Evaluation criteria	Weight
Match to functional requirements	10
Value for money	10
Organisational fit	10
Team (technical & relationship)	10
Strength of project process	10
References (track record)	10
Referees (your current clients)	10
Locations and logistics	10
Warrantees (products & services)	10
Company history and stability	10

We are following a fair and transparent engagement process, supported by well structured documentation. Please follow this process and do not modify the format of the documentation.

We will not be releasing our individual assessments for each response, however we will be sticking to the assessment mechanism.

7. Scope: Features and functions

Functional areas

This project will see the delivery of 93 features, broken into 7 groups or functional areas. The functional areas are:

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

Features details

Feature name	Importance	Notes
Membership pricing can be configured including early bird discounts, joining fee, late fee	Nice to have	sdsdsa

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

Features details

Feature name	Importance	Notes
Automated communications to member through renewal workflow are supported -e.g. renewal reminder, renewal acknowledgement	Nice to have	123222222222222222222222

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

Features details

Feature name	Importance	Notes
Both members can non-members can be targeted	Nice to have	

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

Features details

Feature name	Importance	Notes
Events can be quickly and easily published onto the website	Nice to have	

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

Features details

Feature name	Importance	Notes
The details to be captured for an event can be configured and presented to the end user in a consistent layout	Nice to have	

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

Features details

Feature name	Importance	Notes
Any number of different CPD goals can be defined to reflect different requirements for different types of members	Nice to have	

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

Features details

Feature name	Importance	Notes
Resources within the resource library can be publicly available or	Nice to have	

restricted to members		
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8. Submitting your response

Thank you for taking the time to review our Request for Quotation.

We have provided an associated Request for Quotation response document, which contains a structured format for your response.

In the RFQ response we also ask you to provide further background and supporting information about your company and services, as well as how your system matches our functional requirements.

Our cut off date for responses is: **\$RFQ_reponse_date\$**

Once these responses are submitted we will assess them on their merits and contact vendors with further any questions, or the outcome of our decision.