

# Request for Quotation

**Skopes**



Art

Lane number 6 # 321 industrial Area -Mohali

Mohali, Punjab, ujj

02 October 2014

Neeraj Attri

Commercial in confidence

Project introduction document  
02 October 2014

[Produced by Skopes](#)



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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 Art, 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 98 desired features, broken into 4 Functional areas or groups.

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

### Membership Application

Automation of membership processes, and providing the ability for members to self serve, can represent a significant saving (operational efficiency) to your organisation at the same time as providing improved (self) service.

Online membership application and membership processing can also encourage quicker renewals and an increase the overall number of renewals and new member applications. A list of functional line items relating to Membership Application are provided below for you to include or exclude.

Key Membership Application features are:

- Individuals / corporations can apply for membership via the public website
- Members can choose applicable options and levels
- Communications and payments are handled by the system

### Member Services/benefits

Providing the ability for members to self serve, can represent significant savings to your organisation as well as an improved service. It can also encourage quicker renewals and processing and an increased number of renewals and new members.

Being able to cost effectively provide members with additional online services and membership benefits and being able to provide different levels of services to different membership levels can increase the attractiveness of your offerings, enable you to upsell

your memberships and encourage members to continue to maintain their membership.

Key features include:

- Members can update their own details at any time
- Different levels of memberships can have access to different information/services
- Non-members (contacts or lapsed members) can also update details

## 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

## Project Timeline

The project duration is expected to be **23** days.

- The intended start date is: **01 September 2014**
- The target completion date is: **24 September 2014**



## 2. About Art

### Our mission

To attain top position

### Our short / medium term goals

r

### 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

sdsd

#### The projects contribution to our organisations current goals

dsd



## 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 a.

Team member	Role (title)
a	p
a	g
afgrh	gl
tr	glgl

## 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 **23** days.

- The intended start date is: **01 September 2014**
- The target completion date is: **24 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	01 September 2014
2: df	10 September 2014
3: fd	09 September 2014
4: de	02 September 2014
5: sdd	23 September 2014
6: dfdf	17 September 2014
7: fdfd	17 September 2014
8: fdfsf	17 September 2014
9: fd	17 September 2014
10: fdf	17 September 2014
11: df	17 September 2014
12: Project Completion	24 September 2014

## 6. Evaluation criteria

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

Evaluation criteria	Weight
Locations and logistics	10
Warrantees (products & services)	10
Company history and stability	10
References (track record)	10
Strength of project process	10
Team (technical & relationship)	10
Organisational fit	10
Match to functional requirements	10
Value for money	10
Referees (your current clients)	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 98 features, broken into 4 groups or functional areas. The functional areas are:

### Membership Application

Automation of membership processes, and providing the ability for members to self serve, can represent a significant saving (operational efficiency) to your organisation at the same time as providing improved (self) service.

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Key Membership Application features are:

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- Members can choose applicable options and levels
- Communications and payments are handled by the system

### Features details

Feature name	Importance	Notes
Members can elect to include optional extras to their application e.g. sign up for Special Interest Groups	Nice to have	
Where appropriate fees can be paid via the website	Nice to have	
Corporations can apply for membership and nominate employees to receive membership benefits	Nice to have	
A range of membership types are supported	Nice to have	

Automated communications to applicant through application workflow are supported -e.g. application acknowledge, application approval	Nice to have	
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## Member Services/benefits

Providing the ability for members to self serve, can represent significant savings to your organisation as well as an improved service. It can also encourage quicker renewals and processing and an increased number of renewals and new members.

Being able to cost effectively provide members with additional online services and membership benefits and being able to provide different levels of services to different membership levels can increase the attractiveness of your offerings, enable you to upsell your memberships and encourage members to continue to maintain their membership.

Key features include:

- Members can update there own details at any time
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## Features details

Feature name	Importance	Notes
Non-members (contacts or lapsed members) can also update details	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
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## Features details

[illegible]

[illegible]









		an event can be configured and presented to the end user in a consistent layout
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## 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
Where event attendance attracts PD points, points are awarded automatically when attendance is confirmed	Nice to have	

## 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.