



Mock Request for Proposal (RFP)



Section 1: Introduction and Project Overview

RFP Title: Next-Generation CRM System Implementation **Date Issued:** November 9, 2025
Proposal Due Date: December 15, 2025 **Issuing Organization:** Apex Solutions Group (ASG)

Apex Solutions Group (ASG) is a rapidly expanding mid-sized technology consulting firm seeking to replace its aging, proprietary Customer Relationship Management (CRM) platform with a modern, scalable, cloud-based solution. This new system must support our sales, marketing, and customer support teams across all global offices.

The ideal solution should significantly improve data synchronization, provide advanced analytics capabilities, and integrate seamlessly with our existing Enterprise Resource Planning (ERP) and marketing automation tools. The goal is to enhance the customer experience, streamline internal processes, and drive sales efficiency.



Section 2: Scope of Work and Technical Requirements

2.1 Scope of Work

The selected vendor will be responsible for the full lifecycle implementation of the new CRM system, including:

- **System Selection and Licensing:** Recommending and providing the chosen CRM platform licenses.
- **Data Migration:** Extracting, cleansing, and migrating historical customer data from the legacy system into the new platform.
- **Customization and Configuration:** Tailoring the system to match ASG's unique sales workflows and reporting needs.
- **Integration:** Establishing robust, two-way integration with our existing Salesforce Sales Cloud instance (for specialized functions) and SAP ERP system.

2.2 Technical Requirements

The proposed CRM solution **must** meet the following critical technical criteria:

- **Cloud-Native:** Must be a fully managed, multi-tenant Software-as-a-Service (SaaS) solution.
- **Scalability:** Must support a minimum of **500 concurrent users** and accommodate 20% growth per year for five years.
- **Security:** Must comply with **SOC 2 Type II** and **GDPR** standards.
- **API:** Must provide a well-documented, **RESTful API** for integration purposes.
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