**IMPORT/EXPORT AUTOMATION PROJECT**

**Project Objectives:**

1. Develop a centralized portal for all stakeholders involved in the import and export processes.
2. Develop a single repository to facilitate data exchange utilized by the government in the trading community.
3. Scanners deployed across all sea, air, and land border posts.

**Delivery Timeline:**

Fifteen (15) weeks.

**CONSULTING COMPANY SCOPE OF WORK (15 weeks)**

**A: Select and Evaluate IT Consulting Firm (Hire and onboard IT Consulting Firm)**

Tasks

1. Identify potential IT Consulting firms for the Automating and Streamlining the import process
2. Develop terms of reference for the IT Consulting firms
3. Develop evaluation criteria for the IT Consulting firms.
4. Conduct an evaluation of the proposals for the IT Consulting firms.
5. Lead negotiations with the chosen IT Consulting firm.
6. Onboard the IT Consulting firm on the Import process automation.
7. Develop key performance indicators (KPIs) for the IT Consulting firm.
8. Develop and submit monthly assessment and performance report of the IT Consulting firm to the project secretariat.

**B: Conduct field visit to the port**

Tasks

1. Develop a plan to shadow licensed customs agents through the clearing of goods at the port, with the objective to experience firsthand clearing process at the ports.
2. Identify the licensed customs agents and align on the scope of the field operations visit.
3. Conduct the field operations visit at the port together with the licensed agents and document the process flow.
4. Identify key bottlenecks in the importation and clearing process at the ports.
5. Provide recommendations to simplify the processes and remove the bottlenecks.
6. Document all findings and recommend to the project management office (PMO).

**Required Qualifications**

* The Lead Consultants should have at least 15 years of experience in IT project management.
* At least one of the consultants should have experience managing large scale projects.

**APPROACH TO DELIVERING ASSIGNMENT**

1. **For Section A,** *present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities or proposing an alternative method of undertaking the work). Such suggestions should be concise and to the point, and incorporated in your Proposal.*

Tip: For Section A, Research (research using Google or AI “activities for recruiting, onboarding and managing performance of IT consulting firm for an automation project” and make your suggestions).

Half Page

**For Section A,** we propose the following modifications and improvements to the Terms of Reference to enhance the performance in carrying out the assignment:

The provided Terms of Reference (TOR) offer a solid foundation for selecting and evaluating an IT Consulting Firm. Here are some suggested improvements to enhance performance:

1. Streamlined Selection Process:

Combine Tasks 1 & 2: Merge "Identify potential IT Consulting firms" and "Develop terms of reference" into one task: "Develop a targeted Request for Proposal (RFP) document outlining project goals, scope of work, and evaluation criteria." This clarifies project requirements upfront and attracts qualified firms.

Leverage Digital Platforms: Utilize online platforms specializing in IT consulting services to broaden the reach and attract a diverse pool of qualified firms.

2. Enhanced Onboarding and Knowledge Transfer:

Collaborative Onboarding Workshop: Introduce a new task: "Conduct a collaborative onboarding workshop with the chosen IT Consulting Firm." This workshop facilitates alignment on project goals, communication protocols, stakeholder expectations, and risk management strategies.

Knowledge Transfer Sessions: Include a task for "Knowledge transfer sessions between the project team and the IT Consulting Firm." These sessions ensure a seamless transition of knowledge about the import/export process, stakeholder requirements, and existing systems.

3. Robust Performance Management:

Comprehensive Performance Framework: Modify task 7 to encompass developing a "comprehensive performance evaluation framework with a mix of quantitative and qualitative metrics." This framework should align with project objectives and provide a clear structure for measuring performance.

Regular Performance Review Meetings: Add a task for "Regular performance review meetings with the IT Consulting Firm." These meetings foster open communication, address concerns, and provide constructive feedback for continuous improvement.

Additional Considerations:

Pre-qualification Questionnaire (Optional): Depending on the complexity of the project, consider including a pre-qualification questionnaire to shortlist firms with relevant experience and expertise in import/export automation.

1. **For Section B,** *present and justify here any modifications or improvement to the Terms of Reference you are proposing to improve performance in carrying out the assignment (such as deleting some activity you consider unnecessary, or adding another, or proposing a different phasing of the activities or proposing an alternative method of undertaking the work). Such suggestions should be concise and to the point, and incorporated in your Proposal.*

Tip: For Section B, Research (research using Google or AI “activities for recruiting, onboarding and managing performance of IT consulting firm for an automation project” and make your suggestions).

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For Section B, we propose the following modifications and improvements to the Terms of Reference to enhance the performance in carrying out the assignment:

The current TOR focuses on understanding the import process at the port. Here are some suggestions to broaden the scope:

Expand Stakeholder Engagement: Include a task to "identify and engage with key stakeholders across the import/export ecosystem (e.g., customs brokers, freight forwarders, trading companies)." Gathering insights from all stakeholders provides a more comprehensive understanding of challenges and opportunities.

Data Analysis Integration: Integrate a task to "analyze existing import/export data to identify bottlenecks and inefficiencies." This data-driven approach can complement the field visit findings and provide a more holistic view of the process.

By incorporating these modifications, the Terms of Reference become more comprehensive and enhance the project's overall success by:

Optimizing the IT Consulting Firm Selection Process

Ensuring a Smooth Onboarding and Knowledge Transfer

Establishing a Robust Performance Management Framework

Gaining Broader Stakeholder Insights

Leveraging Data for Informed Decision Making

1. Develop a 15-week workplan to complete Tasks 1 – 14, using an excel template. Tip: To achieve this, first list out all the activities under each task and highlight how many days it will take to complete them. See sample attached.

Each task should be at least 5 activities.

Here's a 15-week work plan to complete Tasks 1 - 14, with each task broken down into at least 5 activities:

| Week | Task/Activity |
| --- | --- |
| 1 | Task: Identify potential IT Consulting firms for the Automating and Streamlining the import process   * Activity 1: Research and compile a list of potential IT consulting firms * Activity 2: Gather and review firm profiles, expertise, and past project information * Activity 3: Shortlist potential firms based on predefined criteria * Activity 4: Prepare a request for proposal (RFP) document * Activity 5: Distribute the RFP to the shortlisted firms |
| 2 | Task: Develop terms of reference for the IT Consulting firms   * Activity 1: Define the scope of work and project objectives * Activity 2: Outline the required deliverables and milestones * Activity 3: Specify the qualifications and experience requirements * Activity 4: Describe the project management and reporting expectations * Activity 5: Finalize and review the terms of reference document |
| 3 | Task: Develop evaluation criteria for the IT Consulting firms   * Activity 1: Identify key evaluation criteria (e.g., technical expertise, project approach, cost, etc.) * Activity 2: Assign weightings to each evaluation criterion * Activity 3: Define the scoring methodology and rubrics * Activity 4: Develop an evaluation matrix or template * Activity 5: Review and finalize the evaluation criteria and process |
| 4 | Task: Conduct an evaluation of the proposals for the IT Consulting firms   * Activity 1: Receive and compile the proposals from consulting firms * Activity 2: Distribute the proposals to the evaluation team * Activity 3: Conduct individual evaluations based on the criteria * Activity 4: Hold evaluation team meetings to discuss and consolidate scores * Activity 5: Prepare a summary report with recommendations |
| 5 | Task: Lead negotiations with the chosen IT Consulting firm   * Activity 1: Identify the top-ranked firm based on the evaluation * Activity 2: Prepare for negotiations (e.g., review proposal, define negotiation strategy) * Activity 3: Conduct negotiations with the chosen firm (e.g., scope, timeline, cost, terms) * Activity 4: Document and review the negotiated agreement * Activity 5: Finalize and execute the contract |
| 6 | Task: Onboard the IT Consulting firm on the Import process automation   * Activity 1: Conduct a project kick-off meeting with the IT Consulting firm * Activity 2: Provide access to relevant documentation and resources * Activity 3: Arrange introductory meetings with key stakeholders * Activity 4: Align on communication protocols and reporting mechanisms * Activity 5: Develop a detailed project plan with the IT Consulting firm |
| 7 | Task: Develop key performance indicators (KPIs) for the IT Consulting firm   * Activity 1: Identify critical success factors for the project * Activity 2: Define measurable KPIs aligned with project objectives * Activity 3: Establish baseline values and target goals for each KPI * Activity 4: Determine the data sources and measurement methods for KPIs * Activity 5: Review and finalize the KPIs with stakeholders |
| 8 | Task: Develop and submit monthly assessment and performance report of the IT Consulting firm to the project secretariat   * Activity 1: Collect data and monitor the IT Consulting firm's performance * Activity 2: Analyze the data and evaluate performance against the KPIs * Activity 3: Identify areas of strength and improvement opportunities * Activity 4: Prepare the monthly assessment and performance report * Activity 5: Submit the report to the project secretariat and discuss findings |
| 9 | Task: Develop a plan to shadow licensed customs agents through the clearing of goods at the port   * Activity 1: Identify licensed customs agents operating at the port * Activity 2: Coordinate and obtain necessary approvals and clearances * Activity 3: Define the objectives and scope of the shadowing exercise * Activity 4: Develop a detailed plan, including schedules and logistics * Activity 5: Communicate the plan to the licensed customs agents |
| 10 | Task: Identify the licensed customs agents and align on the scope of the field operations visit   * Activity 1: Conduct introductory meetings with the identified customs agents * Activity 2: Discuss and align on the scope, objectives, and expectations * Activity 3: Agree on the timeline and logistical arrangements * Activity 4: Obtain necessary clearances and permissions * Activity 5: Finalize the field visit schedule and arrangements |
| 11 | Task 11: Conduct the field operations visit at the port together with the licensed agents and document the process flow   * Activity 1: Shadow customs agents during the clearing of goods at the port * Activity 2: Observe and document the end-to-end process flow * Activity 3: Conduct interviews and gather insights from customs agents |
| 12 | Task 12: Identify key bottlenecks in the importation and clearing process at the ports   * Activity 1: Review and analyze the documented process flow * Activity 2: Identify potential bottlenecks, delays, and inefficiencies * Activity 3: Prioritize the bottlenecks based on impact and frequency * Activity 4: Conduct root cause analysis for the identified bottlenecks * Activity 5: Document the findings and potential improvement areas |
| 13 | Task 13: Provide recommendations to simplify the processes and remove the bottlenecks   * Activity 1: Research best practices and industry standards * Activity 2: Develop recommendations to streamline processes and address bottlenecks * Activity 3: Evaluate the feasibility and potential impact of the recommendations * Activity 4: Prepare a detailed report with recommendations and implementation plan * Activity 5: Present and discuss the recommendations with stakeholders |
| 14 | Task 14: Document all findings and recommend to the project management office (PMO)   * Activity 1: Consolidate all findings, recommendations, and supporting documentation * Activity 2: Prepare a comprehensive report for the PMO * Activity 3: Conduct a review and quality assurance check * Activity 4: Incorporate feedback and finalize the report * Activity 5: Submit the report to the PMO and present the key findings |
| 15 | Buffer week for contingencies and additional tasks (5 days) |

1. Show technical expertise to carry out A and B

- Share a detailed CV of the ff: Procurement manager, a Project Manager, a Project Coordinator, a data analyst, a strategy specialist, Operations Specialist, IT Consultant.

CVs should be 3 pages. See format under

- list all the certifications and second-degree courses related to each of the technical experts. (use Google/AI)

- share 4 recommendations or testimonial (use Google/AI/Linkedin recommendations)