
Savills PMS Project

Request for Proposal

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*** CONFIDENTIAL ***

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1. PROJECT OVERVIEW

1.1 Background

To adopt the rapidly changing business environment, this is a company strategy to review and re-engineer the existing operation processes of Property Management. With an aim to digitalize and streamline most operation processes and to meet the demands and expectations from the growing business.

1.2 Project Goals

To address the key challenges faced by management in their daily operations, the future PMS is aimed to improve efficiency and effectiveness of controls and achieve the following four main operational outcomes and ultimately meeting the four management objectives.

Management Objectives

1. Enhance business resilience
2. Optimise operational efficiency
3. Improve competitive edge in the market
4. Integrating sustainable practices and technologies to support environmental and social responsibility goals

Operational Outcomes

1. Standardisation
 - **Unified Process:** Establish standardized workflows for property management, store all property-related data in the new PMS with uniform formats and structures.
 - **Streamline report generation process:** Standardise the report generation requirements and at the same time have functions to enable users to perform self-service reporting.
 - **Streamline access to property and tenancy documents and enhance transparency:** Display a unified view for owners, tenements, or properties, with a centralised repository for essential property and tenancy documents which ensures that all team members have access to the same up-to-date data, fostering a shared understanding of project status and progress.
 - **Enhance Data Accuracy:** Include dedicated modules for master data management, sundry income management and procurement

management to ensure data is consistent across all platforms and facilitate seamless flow of data.

2. Risk Mitigation

- **Real-time Tracking:** Enable three-way matching for accuracy checks, audit trails for transparent approval histories and documentation trails.
- **Prevent delayed response and missed deadlines:** The new PMS should have comprehensive alerting and notification function to alert staff on upcoming lease/contract expirations, overdue management fees.
- **Eliminate human error in complex calculation:** The new PMS should have the ability to automatically calculate and record various complex transactional elements, such as commissions.

3. Integration

- **Data consistency:** Enhance data flow and ensure data consistency with other property management systems such as Property Cube.
- **Integrate with other systems in Savills:** Streamline operations, increase data accuracy and foster better internal controls.
- **Avoid data fragmentation:** The new PMS should provide a centralised platform where all property related documents are stored in one location.

4. Automation

- **Automated Notifications:** The new PMS can send automated notifications to alert managers about pending approvals on payment.
- **Process Workflows:** The new PMS can routine tasks such as settlement and invoicing.
- **Automated Calculations:** Automates complex or irregular transactional elements such as commission which is currently calculated manually before inputting into Dataswift.
- **Electronic official Receipts and Reminders:** The new PMS should generate electronic official receipts and reminders for all transactions, ensuring accurate record-keeping and facilitate faster retrieval of receipt and reminder information.
- **Streamlined approval processes:** The system should define online approval processes for business processes such as procurement and invoice approval
- **Enhance customer service efficiency:** The new PMS should enable users to filter and search for properties' information using diverse criteria, staff can provide prompt response to landlord/tenant's enquiry and streamlined communication.
- **Automate existing manual processes and reduce overhead cost:**

- Use AI for automated data extraction from DMC/Tenancy Agreements, eliminating manual entry.
- Provide features for electronic invoicing/reminders with tracking, removing the need for manual distribution.
- Implement OCR for automated cheque data extraction and verification.
- Include automated bank reconciliation to streamline monthly processes and reduce labor.

1.3 Purpose of Document

The main objectives of the Document are to:

- Describe the requirements that are essential to support our daily operations and look for process recommendations to improve the overall workflow to achieve the project.
- Source the best overall value PMS solution for our company. The product's functionality and quality are significant factors, other criteria will form the basis of our decision making for project confirmation, as described in the Evaluation Criteria section.

2. SUBMISSION GUIDELINES

2.1 Submission guidelines

- The vendor must include all documents below in the submissions.
- Proposal must be submitted in MS Word format or Savills provided format via email prior to RFP closing date time: **2nd July 2025 (Wednesday) 11:00AM**.
- The proposal must remain valid for a period of 120 days from the date of RFP closing.
- Target project implementation to be started in Q4 of 2025 and launch to pilot sites for production before Aug 2026.
- Any questions about this RFP document, please send to Savills PMS Project Manager by email on or before **16th Jun 2025 (Monday)**

2.2 Project Proposal

The proposal should include, but is not limited to the following elements:

- a) Project Implementation:
 - An overview of the proposed solution

- Schedule and milestones
- Project team structure
- Project implementation plan
- Project deliverables
- Project management methodology
- Training & rollout approach
- Contingency plan
- Maintenance & support model

b) Technical Design:

- An overview of system architecture and hosting environment (e.g. cloud provider, region...etc.)
- System security and compliance
- Data security and compliance
- Backup & recovery plan
- Data migration plan
- Integration capability
- System performance/benchmarking, as applicable

2.3 Pricing Proposal

Indicate the overall fixed price, cost breakdown of each module to be provided, as well as hourly rates and total number of hours for project implementation and customization, and man-day price for future change control procedure, warranty period, maintenance charge for the project, as applicable.

2.4 Company Background and Job Reference

- Description of the firm that includes a general overview, names and credentials of project implementation and support team, number of full-time employees (especially in Hong Kong)
- Outlining the firm's strengths and distinguishing skills or capabilities
- List of Complete / On-going / Incomplete projects implemented in Hong Kong or other countries in the past 36 months
- Expertise, Qualifications and Certifications of Company
- Customer Reference
- Sustainability and financial stability

2.5 Requirement Checklist

Identify if the product can fulfill our requirements listed in the checklist.

- Y = Requirements could be fulfilled by off-the-shelf features / built-in functions
- N = Requirements could not be fulfilled
- Partial = An alternative solution / customization is required to fulfill the requirement. Details should be elaborated in the proposal

3. PROJECT SCOPE

The proposed solution must fulfill the mandatory requirements and support a wide variety of property types with the following basic modules & functions and features.

3.1 Mandatory requirements

- a. Solutions will be provided by SaaS model
- b. With regular updates/patches to maintain the system is evergreen
- c. Integrate with Active Directory (AD) to enable single-sign-on
- d. Support multi-factor authentication (MFA)

3.2 General requirements

- a. A centralized web-based platform (with responsive/adaptive) for supporting a wide range of properties operations.
- b. The initial system resources design targets 800-1000 user accounts while the estimated concurrent user is 100-200.
- c. System language (For input, display & reporting):
 - English
 - Traditional Chinese (Nice to have)
- d. All system records and activities should be logged into the system as an audit trail.
- e. Support session idle timeout, configurable by admin right.
- f. Electronic approval process for all critical business operations, supporting single or multiple levels approval according to different criteria.
- g. Provide intuitive, on-line reporting, dashboard and analysis tools, enable end-users to create customized queries or reports on their own.
- h. Support wide range of search/filter criteria, allow users to combine multiple criteria for searching/filtering and export to excel.
- i. Support sending Invoice/ eBill, e-Reminder or e-Receipt via a dedicated email gateway and retrieve status, if applicable.
- j. Integrate with other sub-systems (with suggested security framework/standard)

- Customer engagement app: post invoice to clients (Landlord/ Tenant) and synchronize payment status in between the app and PMS
- e-Payment handling: integrate with payment channels / single payment gateway
- To support 1) Autopay/ Net banking, 2) Digital wallet, 3) Convenience Store payment, 4) any other common payment methods in HK
- Interface file generation for 6-8 local banks
- Integrate with ERP (Dynamics D365): voucher posting
- Integrate with a centralized document storage (e.g. SharePoint): as a repository for any offline payment / clients' supporting.

3.3 Core modules & functions and features

Module	Description
01.Master Data	<ul style="list-style-type: none">• Manages core data entities like COA, field mappings, billing layout...etc.• Supports data validation and error checking.• Facilitates bulk data updates and maintenance.
02.Landlord/Tenants/Occupant Profile	<ul style="list-style-type: none">• Includes invoice and receipt delivery options.• Manages billing details and payee information.• Allows browsing of history for landlords and tenants.
03.Property Profile	<ul style="list-style-type: none">• Supports bulk updates for property billing details.• Features download options for unit lists.• Integrates master data across systems.

04.Billing & Invoice	<ul style="list-style-type: none">• Automates invoice generation and delivery.• Supports customization of invoice layouts and templates.• Monitors billing statuses and reconcile discrepancies.
05.Credit Control	<ul style="list-style-type: none">• Monitors payment statuses and overdue accounts.• Automates reminder generation for late payments.• Tracks outstanding invoices.• Records Legal action status.
06.Collection	<ul style="list-style-type: none">• Manages receipt and collection of payment methods.• Automates data extraction for transaction verification.• Supports advance payment handling and documentation.• Handles Sundry Receipt collection.
07.Approval Workflow	<ul style="list-style-type: none">• Facilitates approval processes for invoices and transactions.• Supports multi-level approval configurations.• Tracks approval history and status.
08.Vendor Profile	<ul style="list-style-type: none">• Manages vendor information and documentation.• Supports vendor assessments and performance tracking.• Facilitates communication and interactions with vendors.

09. Vendor On-boarding & Performance Evaluation	<ul style="list-style-type: none">• Streamlines the vendor on-boarding process.• Evaluates vendor performance based on predefined criteria.• Manages documentation and compliance for vendors.
10. Procurement	<ul style="list-style-type: none">• Facilitates vendor selection and purchase requisition processes.• Manages contract creation and compliance tracking.• Handles Supplier invoices• Automates procurement reporting and invoice matching.
11. Payment	<ul style="list-style-type: none">• Handles payment processing and settlement.• Supports various payment methods (e.g., ACH, bank transfer).• Generates payment advice and tracks payment statuses.
12. Reporting and Dashboarding	<ul style="list-style-type: none">• Provides comprehensive reporting capabilities for financial and operational data.• Supports customizable dashboards for real-time insights.• Enables data visualization and trend analysis.
13. Lease Management	<ul style="list-style-type: none">• Tracks lease activities and renewal processes.• Manages lease terms, deposits, and rental refunds.• Automates notifications for expiring leases.
14. Fixed Asset Management	<ul style="list-style-type: none">• Manages fixed asset registers and depreciation calculations.

	<ul style="list-style-type: none"> • Tracks asset lifecycle and maintenance schedules. • Automates reporting for asset-related financials.
15.Budgeting	<ul style="list-style-type: none"> • Supports budget preparation with application of past year (s)' figures and monitoring functionalities. • Facilitates approval workflows for budget changes. • Generates reports on budget performance and variances.
16.System Log and Audit Trail	<ul style="list-style-type: none"> • Tracks user activities and system changes for compliance. • Maintains logs of transactions and modifications. • Supports audit reporting for security and accountability.
17.Integration	<ul style="list-style-type: none"> • Facilitates data synchronization with internal & external systems. • Ensures data mapping and transformation between platforms. • Provides a centralized interface for system integration.
18.Security Setting	<ul style="list-style-type: none"> • Establishes security protocols for data protection. • Manages user authentication and access controls. • Ensures compliance with relevant security standards.

19.User/Role Management	<ul style="list-style-type: none">• Manages user access and permissions.• Supports role-based security settings.• Allows customization of user profiles and access rights.
20.Technical Requirement	<ul style="list-style-type: none">• Outlines system requirements for deployment and operation.• Supports security protocols and system integration.• Ensures compatibility with existing IT infrastructure.
21.General	<ul style="list-style-type: none">• Manages system-wide settings and configurations.• Provides a robust alerting and notification system.• Supports multiple languages and input methods.

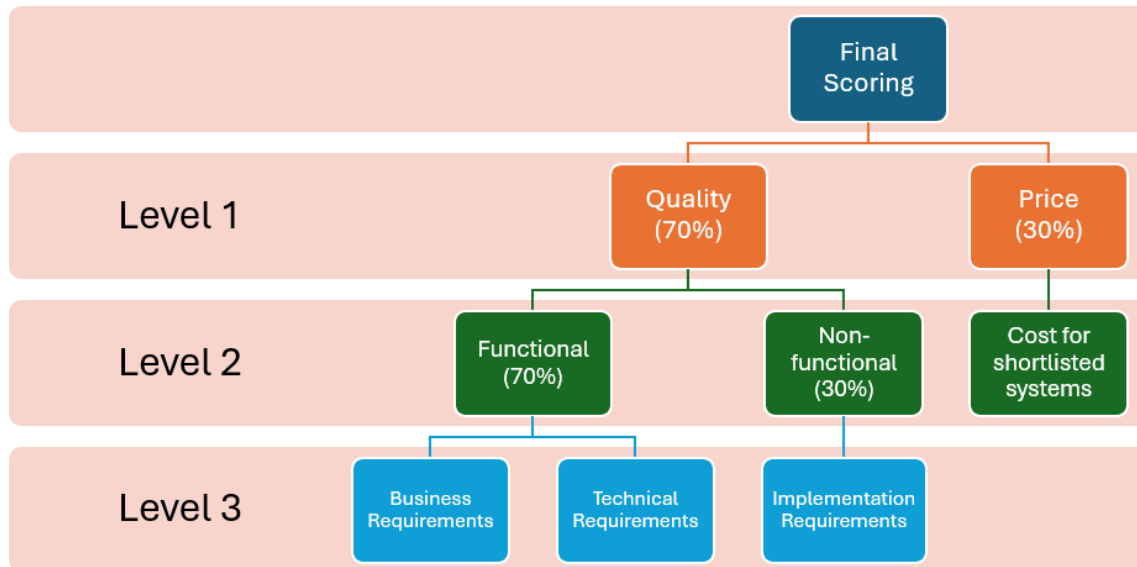
3.4 Functional Requirements Summary

Below is a summary of the functional requirements. For the details, please refer to the detail's requirement checklist in attachment section. If there is any part of the requirements could not be fulfilled by off-the-shelf features / built-in functions, an alternative solution / proposed customization should be elaborated in the proposal.

No	Module	Priority			Total
		High	Medium	Nice-to-have	
01	Master Data	11	2	2	15
02	Landlord/Tenants/Occupant Profile	14	2	1	17
03	Property Profile	12		1	13
04	Billing & Invoice	21	8	1	30
05	Credit Control	12		1	13
06	Collection	19	4	2	25
07	Approval workflow	4			4
08	Vendor Profile	8	1	1	10
09	Vendor on-boarding & performance evaluation	3		1	4
10	Procurement	71	1	15	87
11	Payment	17	2	1	20
12	Reporting and dashboarding	48	6	1	55
13	Lease Management	15			15
14	Fixed Asset Management		3		3
15	Budgeting	3			3
16	System log and audit trail	10	2		12
17	Integration	13	2		15
18	Security setting	23			23
19	User/Role management	12			12
20	Technical Requirement	6			6
21	General	9	4	2	15
	Total	331	37	29	397

4. EVALUATION CRITERIA

Each proposal will be reviewed and scored based on the following weighted criteria.





The evaluation criteria outlined below are provided as examples and are not exhaustive; additional factors may also be considered when assessing proposals submitted in response to this RFP.

- Company/Project team background & experience
 - Project team / development team location & time zone
 - Expertise, Qualifications and Certifications of Project team/ Hosting service
 - Customer reference
- Product quality
 - Proposed solution & process recommendations
 - Requirements checklist fulfillment
 - Capability of Customization
 - System architectural design / Security compliance / Scalability
 - Performance measurement and benchmarking of the system
- Project implementation approach
 - Proposed Project Timeline, Project team structure/ size, Regular meeting, development process control, deliverables to be provided
 - Flexibility to accept changes of requirements in different project stages
 - Change control procedure

- Risk management, assumptions
- Deployment model
- Service level/model of post-implementation support

5. ATTACHMENT

Attachment	File
1.PMS User Requirement checklist	 PMS User Requirement Checkl
2.Savills Supplier Questionnaire	 Savills Supplier Questionnaire.xlsx

End of Document