REQUEST FOR PROPOSAL

Enterprise Customer Relationship Management (CRM) System Implementation

RFP Number: RFP-2025-IT-0042

Release Date: November 24, 2025

Proposal Due Date: January 08, 2026 by 5:00 PM EST

Issuing Organization:
TechCorp Industries, Inc.
1234 Innovation Drive
San Francisco, CA 94105

Primary Contact:
Sarah Martinez, Procurement Manager
Email: s.martinez@techcorp.com
Phone: (555) 123-4567

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1. EXECUTIVE SUMMARY

TechCorp Industries, Inc. is seeking qualified vendors to provide a comprehensive Enterprise Customer Relationship Management (CRM) system to support our growing customer base and sales operations. We currently serve over 50,000 customers across North America and are experiencing rapid growth requiring a modern, scalable CRM solution.

The selected vendor will be responsible for providing software licensing, implementation services, data migration from our legacy system, training for approximately 250 users, and ongoing support and maintenance. We are looking for a partner who can deliver a solution that integrates seamlessly with our existing technology stack and provides the flexibility to scale with our business.

This RFP outlines our requirements, evaluation criteria, and proposal submission guidelines. We encourage all interested vendors to carefully review this document and submit comprehensive proposals by the deadline specified on the cover page.

2. BACKGROUND AND OBJECTIVES

2.1 Company Background
TechCorp Industries is a leading provider of industrial automation solutions with annual revenues of $500M. Founded in 1998, we have grown from a regional supplier to a national leader in our industry. Our current CRM system has been in use for over 10 years and no longer meets our operational needs.

2.2 Current Challenges
Our legacy CRM system suffers from several limitations including limited mobile access, poor integration with our ERP system, lack of advanced analytics, and outdated user interface. These limitations have resulted in decreased productivity and customer satisfaction.

2.3 Project Objectives
The primary objectives of this project are to:
• Implement a modern, cloud-based CRM system that supports our sales, marketing, and customer service teams
• Improve data visibility and reporting capabilities across the organization
• Enable mobile access for field sales representatives
• Integrate seamlessly with our existing SAP ERP system
• Enhance customer experience through improved case management and service delivery
• Provide a scalable platform that can grow with our business over the next 5-10 years

3. SCOPE OF WORK

3.1 Software Licensing
The vendor shall provide all necessary software licenses for 250 users, including appropriate mix of full licenses and read-only licenses based on role requirements.

3.2 Implementation Services
The vendor shall provide comprehensive implementation services including:
• Requirements gathering and analysis
• System design and configuration
• Customization development as needed
• Integration with SAP ERP and other existing systems
• Data migration from legacy CRM system (approximately 500,000 customer records)
• User acceptance testing support
• Go-live support

3.3 Training
The vendor shall provide comprehensive training including:
• Administrator training for IT staff (5 personnel)
• End-user training for all 250 users
• Development of training materials and documentation
• Train-the-trainer sessions for ongoing internal training

3.4 Support and Maintenance
The vendor shall provide ongoing support and maintenance including:
• 24/7 technical support with guaranteed response times
• Regular system updates and patches
• Access to online knowledge base and resources
• Quarterly business reviews

4. TECHNICAL REQUIREMENTS

4.1 System Architecture
• Cloud-based SaaS solution with 99.9% uptime guarantee
• Support for 250 concurrent users
• Mobile applications for iOS and Android
• Browser-based access (Chrome, Firefox, Safari, Edge)

4.2 Functional Requirements
Sales Module:
• Lead and opportunity management
• Sales forecasting and pipeline management
• Quote and proposal generation
• Territory management

Marketing Module:
• Campaign management
• Email marketing integration
• Lead scoring and nurturing
• Marketing analytics

Service Module:
• Case management
• Knowledge base
• Service level agreement (SLA) tracking
• Customer portal

4.3 Integration Requirements
• RESTful API for system integration
• Pre-built integration with SAP ERP
• Integration with Microsoft Office 365
• Integration with existing phone system for call logging

4.4 Security Requirements
• SOC 2 Type II certification required
• Role-based access controls
• Data encryption at rest and in transit
• Multi-factor authentication
• Regular security audits and penetration testing
• GDPR and CCPA compliance

5. PROPOSAL REQUIREMENTS

5.1 Executive Summary
Provide a brief overview of your proposed solution and why your company is best suited for this project.

5.2 Company Qualifications
• Company history and background
• Relevant experience with similar implementations
• Customer references (minimum 3)
• Financial statements for the past 2 years
• Certifications and partnerships

5.3 Technical Proposal
• Detailed description of proposed CRM solution
• System architecture and technology stack
• Compliance with technical requirements (Section 4)
• Integration approach and capabilities
• Data migration strategy
• Security and compliance measures

5.4 Implementation Approach
• Project methodology
• Detailed project plan with timeline and milestones
• Roles and responsibilities
• Risk management approach
• Quality assurance procedures

5.5 Training Plan
• Training methodology and materials
• Training schedule and duration
• Ongoing training and support resources

5.6 Pricing
Provide detailed pricing breakdown including:
• Software licensing costs (one-time and recurring)
• Implementation services costs
• Training costs
• Annual support and maintenance costs
• Any additional costs or optional services

All pricing must be valid for 90 days from proposal submission date.

6. EVALUATION CRITERIA

Proposals will be evaluated based on the following criteria:

Criteria	Weight
Technical Capabilities and Solution Fit	30%
Implementation Approach and Timeline	20%
Company Experience and References	15%
Pricing and Value	20%
Training and Support	10%
Innovation and Future Roadmap	5%

Evaluation Process:
1. Initial screening for completeness and compliance
2. Technical evaluation by evaluation committee
3. Shortlist of top 3 vendors
4. Product demonstrations and presentations
5. Reference checks
6. Final vendor selection and contract negotiation

7. TIMELINE AND MILESTONES

Activity	Date
RFP Release	November 24, 2025
Pre-proposal Conference (Optional)	December 04, 2025
Questions Deadline	December 24, 2025
Proposal Submission Deadline	January 08, 2026
Evaluation and Shortlisting	January 23, 2026
Vendor Presentations	February 07, 2026
Final Selection	February 22, 2026
Contract Execution	March 09, 2026
Project Kickoff	March 24, 2026

8. TERMS AND CONDITIONS

8.1 Submission Instructions
Submit one (1) electronic copy of your proposal in PDF format to s.martinez@techcorp.com by the deadline specified on the cover page. Late submissions will not be accepted.

8.2 Questions and Clarifications
All questions must be submitted in writing via email to the contact person listed on the cover page. Responses will be provided to all prospective vendors.

8.3 Right to Reject
TechCorp Industries reserves the right to reject any or all proposals, to waive informalities and minor irregularities in proposals received, and to accept any portion of a proposal or all items proposed if deemed in the best interest of the company.

8.4 Confidentiality
All information contained in this RFP is confidential and proprietary to TechCorp Industries. Vendors shall not disclose or reproduce this information without prior written consent.

8.5 Costs of Preparation
TechCorp Industries will not be responsible for any costs incurred by vendors in preparing and submitting proposals in response to this RFP.

8.6 Contract Terms
The selected vendor will be required to execute TechCorp Industries' standard terms and conditions. A sample contract is available upon request.