



# **RFQ – Introduction of a CRM system (Microsoft Dynamics) to the ITPO Germany Investment and Technology Promotion Platform (ITPP)**

UNIDO Investment and Technology Promotion Office (ITPO) Germany

UNIDO Project ID: 160083

## **1. Organizational context**

UNIDO is a specialized agency of the United Nations that promotes inclusive and sustainable industrial development (ISID). Private sector development through improvement of business environments is among the core services of the Investment and Technology Promotion Division (INV), which is under the Department of Digitalization, Technology and Innovation (DTI).

The UNIDO Investment and Technology Promotion Office (ITPO) Germany was established on the UN Campus in Bonn (Germany) in 2017. It promotes sustainable outward investments and technology transfer by German companies into industrializing countries in the following sectors: Energy, Energy Efficiency, Agribusiness, Environmental Technologies, Manufacturing, Infrastructure Development and Health.

## **2. Main Objectives of the Investment and Technology Promotion Platform (ITPP)**

In order to connect investors, technology providers and project owners from Europe/Germany with potential partners and projects in industrializing/developing countries, the ITPP will provide a web-based portal facilitating the promotion of investment projects, technologies, innovations and business models that contribute to inclusive and sustainable industrial development in these countries. Once set up, the portal should be interactive and mainly operated by ITPO staff and experts in the backend.

## **3. Purpose of this Contract for Services**

The purpose of this tender for services is to contract a service provider who will consult the ITPO Germany team about introducing Microsoft Dynamics as CRM system to the Investment and Technology Promotion Platform (ITPP), choosing the necessary licenses and the right set of features within Dynamics in order to meet the CRM requirements of the ITPP and ITPO Germany office. Furthermore, the service provide will technically plan the corresponding setup and connection handling, and implement it according to the guidelines and specifications of the ITPO Germany team. Deliverables, among others, will be: consultancy on Dynamics, setup of Dynamics (365 cloud version), creation of custom fields and structures, usage of flows and webhooks (if needed), usage of Azure service bus, connection between Dynamics and Exchange, adaption of the Dynamics forms where needed.



#### 4. Terms of Reference

##### a. Main Elements of the ITPP Portal – *for explanation purposes, implementation is part of another tender*

The ITPP consists of two sections from the market point of view:

1. **Technologies and innovations**, mainly by German or European companies, which are innovative and relevant in terms of the SDG Sustainable Development Goals) impact and applicable to the conditions of developing countries. This section will contain generic descriptions of technologies, exemplary cases/business models and allow for filters (e.g. by sectors, clusters or applications). Section 1 will provide orientation, inspiration and increase the visibility and transparency about these technologies. It should feature films, interviews and short technical explanations of these technologies and their potential benefits.
2. **Investment and technology transfer projects (one project data-base)**, which include:
  - **Project directed out of Germany/Europe** and seeking partners in industrializing or developing countries. This section will list projects of which the owners of technologies (possibly listed in Section 1 of the portal) are actively searching for partners for the implementation of these projects. Projects will describe the business model, investment offer/needs, envisaged business partnerships, preferred regions/countries for implementation and examples of successfully implemented projects. Interested partners and investors can use the web portal to contact the project owners and/or ITPO Germany expert staff to discuss projects, investment opportunities and potential future cooperations.
  - **Investment projects in industrializing or developing** countries seeking investors and technologies, mainly from Germany and industrialized countries. This section will list projects of investors, companies, industrial parks or business development organizations based in industrializing or developing countries that are seeking partnerships, investments or technologies from German or European companies. Project profiles will be aligned with a separate system of the UNIDO online portal for investment promotion (currently being launched).

Section 2 of the ITPP should ideally become an integral part of the UNIDO portal, allowing ITPO Germany expert staff to promote, add to and contribute to this joint database of investment projects.

##### b. Personas

**Public User (Frontend User without Login):** Public users can see the public static content. They can search for companies, filter results by properties of the companies, and view details of companies, projects and technologies. Public users can see less information that logged in users, e. g. detail contact data or project documents will not be publicly visible.

Public user's data and actions have no impact on the Dynamics part.

**Company (Frontend User with Login):** Companies register themselves into the ITPP portal, entering their company data and their contact persons. They provide detailed description



about technologies they offer and projects they are interested in to start or already running. Companies use the ITPP portal to initiate communication with other companies. Companies, their projects and technologies can originate from and/or belong to geographical areas of various scope, e.g. countries, continents or parts of a continent.

Company users are being synchronized to Dynamics. Synchronization happens one-way, from ITPP to CRM. ITPP propagates change information via Azure service bus. CRM is responsible of retrieving the data, assuming that all necessary data structures and attributes have been initially set up correctly and completely.

There shall be some aggregate information provided to CRM about how many projects and from which categories, countries etc. the company is featuring, so communication created in CRM can be segmented by criteria and categories existing in ITPP.

**Investor (Frontend User with Login):** Investors register themselves into the ITPP portal, entering their company data and their contact persons. In opposite to companies, they do not appear in the public area of the ITPP portal, neither do they provide any technologies or projects.

Investor users are being synchronized to Dynamics. Synchronization happens one-way, from ITPP to CRM. ITPP propagates change information via Azure service bus. CRM is responsible of retrieving the data, assuming that all necessary data structures and attributes have been initially set up correctly and completely.

**ITPO (Backend User with Login):** ITPO users manage the content of the ITPP portal, both of the static content like articles and explanatory pages, and of the user generated content. They approve registrations for Company and Investor users and are capable of reviewing and editing their content, and of setting it visible/invisible.

Public user's data and actions have no impact on the Dynamics part.

**c. Entities – for explanation purposes, implementation is part of another tender**

Main entities are among others: Company, Contact, Technology, Project, Area, Document, User, Action Protocol.

Comprehensive entities like Project or Company will have both static parameters and dynamic parameters, the latter implemented as 1-n and m-n relation in the database.

Parameters may contribute to the public area of the portal, being publicly visible and used for UI creation and segmentation. They also may be used as internal criteria, e.g. 'completeness of data', 'type of investor' or 'regional transferability' being not visible but rather contributing to the logical structure and workflows within the ITPP portal.

**d. Workflows**

**Expectation to CRM implementation**

Unidirectional synchronization towards MS Dynamics CRM will be established from the ITPP portal, using the Azure Service Bus technology. Notifications are being pushed upon changes on the following entities: Company, Contact, Technology, Project, Document, User. Automated notifications are also being pushed upon certain actions in the portal, e.g. registration or contact request between companies. Consultancy on how such events and/or their aggregation can be shown within Dynamics are part of this tender and subject of deliver prior to implementation.

### Overview of Workflows and Actions:

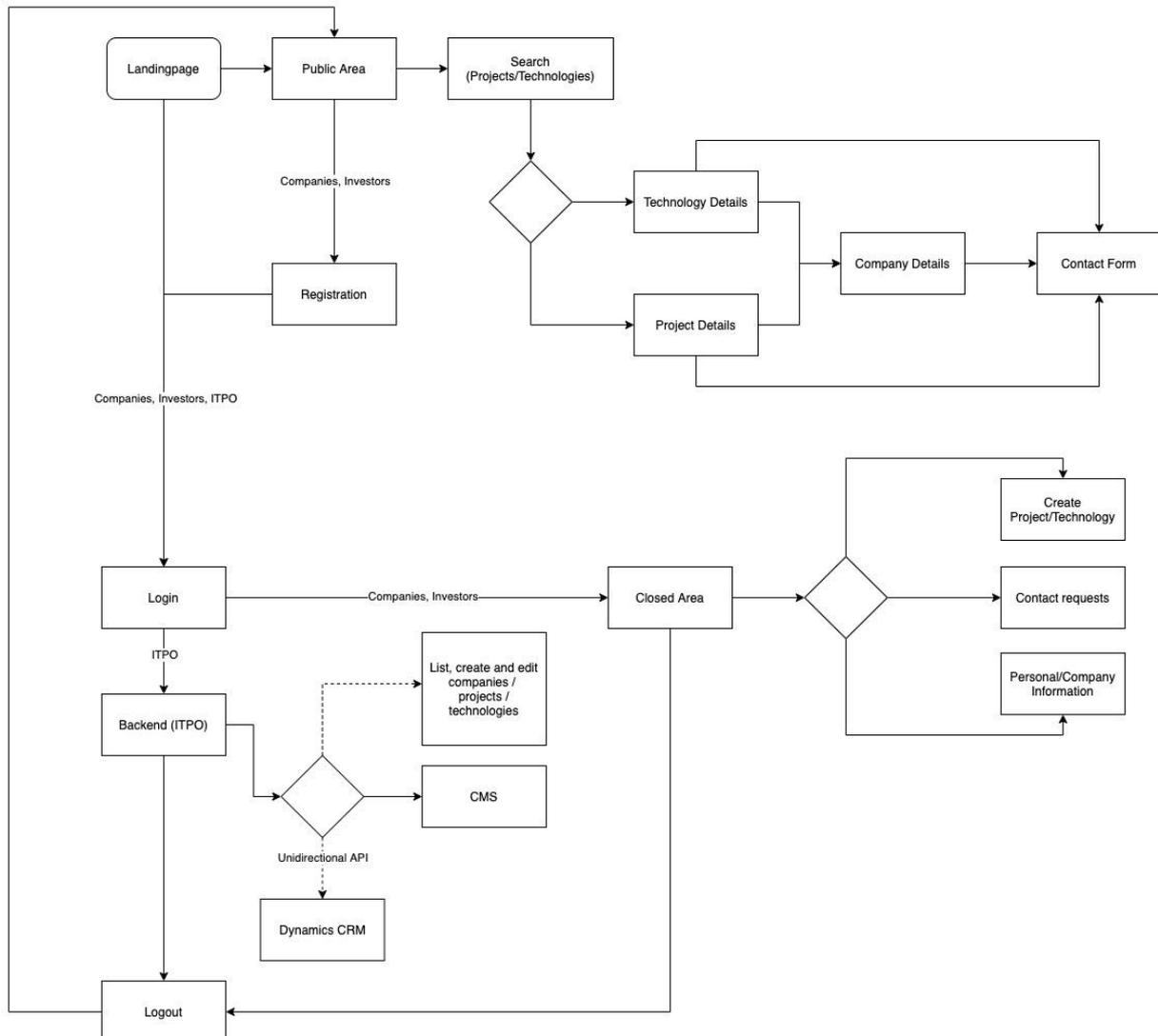
**Public User:** Browse ITPP portal, view static content, search, filter and view companies, projects, technologies.

**Company:** Registration, email verification, login, list own projects, list own technologies, add/edit project, add/edit technology, show/hide project/technology, upload documents, browse portal, look up companies/technologies/projects, contact a company.

**Investor:** Registration, email verification, login, upload documents, browse portal, look up companies/technologies/projects, contact a company.

**ITPO:** login, list and filter all companies, add/edit/hide/unhide company, list all their projects, list all their technologies, add/edit project, add/edit technology, show/hide project/technology, upload documents, browse portal, look up companies/technologies/projects, add/edit dynamic parameters of companies/projects/... Besides standard email verification upon Company/Investor registration, there will be an approval workflow (identification of existence and competencies) led by ITPO.

The service provider(s) for design and implementation of the ITPP have received a detailed plan of all crucial workflows within the ITPP portal, like shown in the example below:





**e. UI design specification – for explanation purposes, implementation is part of another tender**

The service provider will create the user interface according to a detailed specification as a result from another tender. That UI design specification will cover the most relevant building blocks. All other necessary elements the service provider will derive himself from that specification and discuss with the customer.

Next to the detailed UI design specification the service provider will receive a set of wireframes describing the main aspects of user interface, its building blocks and particular steps of the main workflows, like shown in the example below:

**LOGO**

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**Lorem ipsum dolor sit amet,  
consetetur sadipscing elitr**

What sectors are you investing in or funding? (multiple entries possible)?\*

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Renewable Energy           | <input type="checkbox"/> Comprehensive Industrial Development Solutions (nexus and multi-sector approaches) |
| <input type="checkbox"/> Energy Efficiency                     | <input type="checkbox"/> Mobility   |
| <input checked="" type="checkbox"/> Environmental Technologies | <input type="checkbox"/> Other  |
| <input type="checkbox"/> Agribusiness                          |   |
| <input type="checkbox"/> Infrastructure (needs to be defined)  |   |
| <input type="checkbox"/> Health & Sanitation                   |   |
| <input type="checkbox"/> Manufacturing                         |   |
| <input type="checkbox"/> Mining / Natural Resources            |   |
| <input type="checkbox"/> Mobility                              |   |

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**f. Legal Implications**

The ITPP platform will obey the *Personal Data Protection and Privacy Principles*, as defined in attachment A.1.

Furthermore UNIDO is a member of the UN Data Privacy Policy Group (UN PPG), which endorsed the Personal Data Protection and Privacy Principles. The Personal Data Protection and Privacy Principles were formally adopted by the High Level Committee on Management (HLCM). The Principles set out a basic framework for the processing of personal data by or on behalf of the United Nations System Organizations in carrying out their mandated activities.



UNIDO will instruct the contractor about where and in which extend to obey which of these principles.

#### **g. Additional Remarks**

All the above mentioned personas, entities, workflows, and other specifications are intended to thoroughly describe the deliverables, yet explicitly they do not claim to be complete. The service provider will take all necessary implementation steps to ensure that the portal is completed in accordance with the original ideas, and therefore provide discussions and workshops with the customer in order to discuss questions, define what is missing in specification and fine-tune details.

### **5. Services to be provided**

- Give consultancy and manage the detailed technical conception and implementation of the CRM system (Microsoft Dynamics) for the ITPP portal, including all necessary customizations, implementing necessary data connections and business logic, and finalizing both systems' integration from the CRM side.
- Conduct workshops and consultations with ITPO Germany and UNIDO staff (consultations, conception, refinement, introduction to Dynamics and to the particular usage) and to discuss open questions.

### **6. Offer and Quotation – Requirements**

- Experience and explicit references in planning and implementation of Microsoft Dynamics environments.
- List of skills within the Microsoft software ecosystem.
- Number of employed full-time equivalents, differentiated in programming and non-programming. Turnover of the recent 3 years of the legal entity acting as offering contractor.
- CVs of designated project members including individual project histories.
- Based in Europe.
- Proven ability to write technical documentation in English. Fluency in written and spoken English.
- Confirmation of necessary implementation capacities.

Deadline for Offer and Quotation: **11th January 2021, COB**

### **7. Commissioning of Expertise:**

Interested contractors who have submitted a proposal will be invited to conduct additional scoping interviews up until 19<sup>th</sup> January 2021. These scoping interviews will be based on the technical and financial offers and are an integral part of the tender process. Contract implementation is foreseen between January 2020 and April 2021 when the ITPP Portal should be launched.