



CRM, Logistics and Compliance Management

Request for Proposal

Response Deadline: August DD, 2009

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1 Overview of key information

1.1 Key contact data

Contact person:

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1.2 Key dates

Date	Milestone
XX XX, 2009	Request for proposal released
XX XX, 2009	Due date of proposals
XX XX, 2009	Evaluation of proposals
XX XX, 2009	Selection of vendors

2 Introduction

This section gives a short description of the company, the project and the contents of the request for proposal.

2.1 Executive Summary

TastyTreats Corporation (TTC) is a growing supplier of gourmet desserts to consumers and restaurants. Accordingly, TTC offers its products via two sales channels – through distributors to consumer food stores and then at wholesale to restaurants. TTC was founded in 1989 and has been slowly increasing the scope of its operations. Last year, TTC was acquired by one of the largest European food manufacturing consortiums – Royal Foods plc (RF) – as part of RF's strategy to expand internationally and is now a wholly owned subsidiary.

To date over the last year, Royal Foods has been focused on understanding how TTC operates and has taken a hands-off approach to management after the acquisition. RF is increasingly becoming anxious to accelerate RF's return on its investment by leveraging TTC's brand name in the American market. Accordingly, RF has asked TTC to prepare a strategic plan for how TTC can increase its operating scope from the selected markets it now operates in to a national scale. To achieve this goal, TTC needs to implement a multi-tier application, which will facilitate customer relationship management (CRM) for its sales channels, as well as manage its growing logistics chain. Additionally, in order to comply with emerging European regulations, the TTC must also provide an automated daily report feed on its customers, business operations, and financials to RF for incorporation into their business intelligence systems.

Therefore, to emphasize, are several key business priorities for this project:

First, RF wants TTC to have a more in-depth understanding of their key customers. Customers vary in terms of their profitability and TTC needs to gain greater understanding of which markets and segments to focus on. They would like to use a CRM application to gain visibility into TTC's customer base and an analytics component to analyze the sales pipeline.

Second, as mentioned, TTC is currently only operating in selected markets. In order for TTC to be able to expand its operational scope and move towards a national focus, the company will need an improved application to manage its logistics chain. This will increase the company's flexibility and efficiency, as well as reduce cost.

Finally, as determined by emerging European regulations as a consequence of the acquisition, TTC's new national scope will move them into a new size category. This will require that RF incorporate key metrics on TTC's operations into their regulatory reporting.

RF will require that TTC deliver these metrics as an automated feed which can be incorporated into their existing business intelligence systems.

In summary, the business drivers for this project are thus to: (1) increase profitability by understanding the sales pipeline, (2) reduce cost by tracking the logistics chain and increasing its efficiency, and (3) compliance with regulations.

2.2 Overview of RFP

The request for proposal outlines the vendor, functional and technical requirements that have to be fulfilled by the proposed solution. The focus of the request for proposal is on requirements specific to TTC.

3 Vendor Requirements

This chapter describes how the proposal should be structured and which selection procedure will be used leading to a final decision.

3.1 Requirements

The following describes TTC's high-level requirements for each workstream.

Workstream I: Customer Relationship Management

- CRM application appropriate for the Small and Medium Businesses (SMB) market should be implemented and deployed for use by TTC's sales team
- CRM system should be compliant and integrated with TTC's enterprise-wide SOA initiative
- Due to the sensitivity of the customer data contained, TTC needs the CRM system to run inside the firewall, unless SaaS-based system has appropriate security sub-systems
- TTC is standardized on Microsoft Exchange/Outlook platform – CRM system should integrate with Outlook for contact records
- Should facilitate mobile access for TTC's field sales team
- Comprehensive forecasting, territory management, and channel management features are desired
- Customizable dashboard module, both for sales team, sales management, and TTC executives is urgently needed
- CRM application must have an analytics component in order to provide analysis and reporting functionalities

Workstream II: Logistics Management

TTC has a complex logistics chain, from tracking raw materials from the supplier to baking production facilities to ensuring that the products traverse the pipeline from the baking facility through TTC's warehouses to its distributors and eventually customers.

TTC is looking for the following functionality:

- Billing and order management functions to streamline interaction with suppliers
- Integration with wireless reporting tools deployed in our facilities
- Product distribution tracking features
- Streamline communication between logistics providers, buyers, suppliers, shipping agents, clearing agents, warehouse agents and delivery agents
- Automate fulfilment process
- Shipment status and Inventory dashboards
- Warehouse management functionality

Workstream III: Regulatory Compliance

- By XX XX, 2009, TTC is committed to providing detailed business metrics to RF plc for its EU compliance processes.
- The following metric sets are required:
 - Transaction Information: Date, Customer ID, Product ID, Gross Amount
 - Customer Information: Customer ID, Customer Name, Contact Details, Industry SIC code
 - Profit & Loss: Revenue, Cost of Goods Sold, Expenses by Category, Gross Profit, Net Profit
- Transaction information should be provided daily
- Customer information and P&L should be provided at business month-end
- Metrics need to be fully automated and integrated with RF's existing business intelligence application (SAP Business Objects)

3.2 Proposal structure

The proposal must be structured in order to facilitate the evaluation process and cover the following topics in detail:

- Letter of Intent/Company Information
- Scope Statement
- Work Breakdown Structure with Milestones
- Resource Sheet (Proposed Personnel)
- Risk Management Approach
- Financial Analysis
- Project Management
- Project Change Request Process
- Provide signed Project Charter (Terms and Conditions documents)

3.2.1 Letter of Intent/Company Information

You should describe your company as follows:

- Size of the organization
- Total number and type of professionals in the organization
- Previous similar project implementation
- Tools and Methodology
- Elements differentiating your company as market leaders in this area of expertise

3.2.2 Scope Statement

Describe project characteristics and requirements, as well as project deliverables. Details your company's view of the overall problem statement that takes the RFP and puts a custom spin on the overall approach that your company will take to implement the right solution.

3.2.3 Work Breakdown Structure with Milestones

Captures the detailed set of tasks and milestones that will be needed to accomplish all of the requirements detailed in the RFP.

Summarize the overall approach and deliverables based on the requirements. Because of the size and complexity of the project, it is extremely important that all project workstreams are clearly described and understood by all parties and that enough resources are allocated to each workstream:

- Workstream I: Customer Relationship Management
- Workstream II: Logistics Management
- Workstream III: Regulatory Compliance

3.2.4 Resource Sheet (Proposed Personnel)

Assign proposed resources to the tasks in the WBS to define the number of resources and skills sets of those resources.

This lists the overall project structure and composition of people that will be needed to accomplish the tasks detailed above. The intention is to define the roles and number of people that will eventually fill those roles. An additional piece of this task is to introduce the main players of the team which will be your overall project group. Usually the project Partner, Associate Partner, Project Manager, Architect and Subject Matter Experts (SMEs) will be filled here. The other roles will just be simply defined, but not staffed.

3.2.5 Risk Management Approach

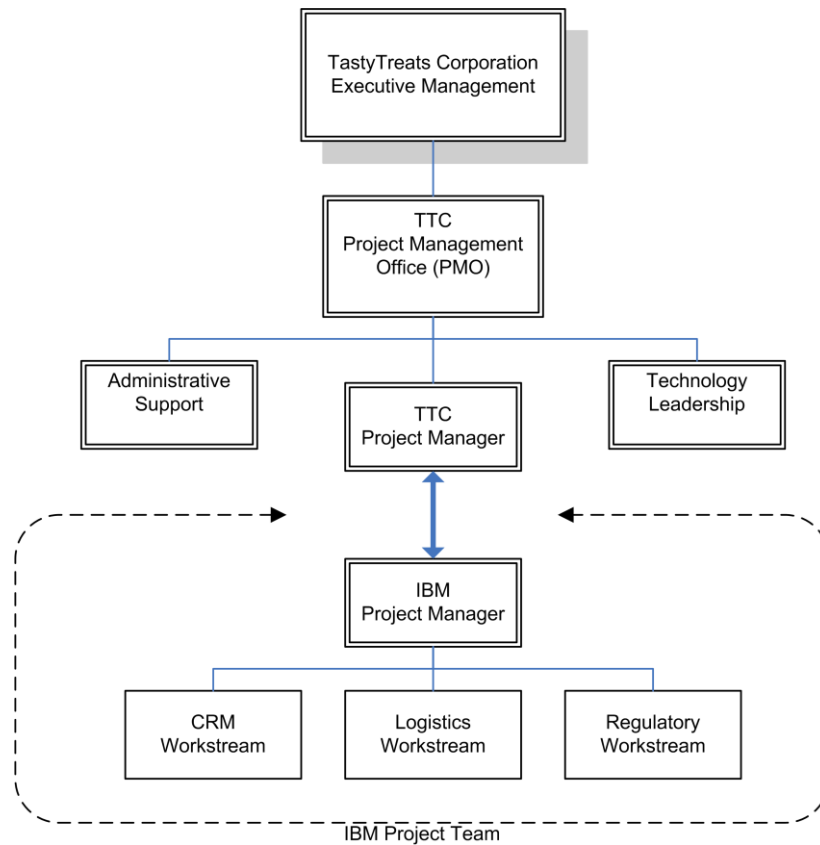
- Issues and Assumptions Log: This log captures any issues and/or assumptions the project team defines during the first workstream.
- List of Prioritized Risks: Details how risks will be defined, escalated, and communicated through meetings and documentation.

3.2.6 Financial Analysis

Create a financial analysis of the costs and benefits of the proposal at a discount rate of 10%. Please calculate ROI and NPV.

3.2.7 Project Management

Please propose the project management approach to this project. Include project team alignment model. Refer to the following structure as a guide.



3.2.8 Project Change Request Process

Please describe your company's process for making changes to the project once in progress.

3.2.9 Project Charter (Terms and Conditions Document)

The project charter will be signed by the client on approval of the proposal specified in this document. Please include all applicable terms and conditions that this project would be subject to. Please include information highlighting the following areas,

- Termination
- Project Success Criteria
- Business Conduct Guidelines
- Confidentiality

3.3 The Final Selection

Three main criteria will be evaluated:

- Proposal content
- Presentation of material
- Conference call demonstration

3.3.1 Proposal content

The following will impact the overall evaluation:

- Cost structure
- Completeness of the project management direction