Annex A: Terms of Reference
RFP/2017/1040
Global Marketing Automation System

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1 Introduction

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the U.N. General Assembly in 1950 to provide protection and assistance to refugees and Internally Displaced People (IDPs). In more than five decades, the agency has helped tens of millions people to restart their lives. Today, UNHCR is one of the world's principal humanitarian agencies. Its staff of more than 10,000 personnel is helping more than 65.3 million people in more than 128 countries. Staff members work in a diversity of locations and conditions including in our Geneva-based Headquarters (HQ) and more than 100 field locations. For more information, please see http://www.unhcr.org.

UNHCR's Public Sector Partnership (PSP) Section raised over USD 351 million in 2016 which is almost entirely funded by voluntary contribution. Donations are sought every year for UNHCR's Annual Programme Budget, which includes the support of regular operations. But the agency also launches supplementary appeals throughout the year, seeking extra donations for new emergencies that cannot be forecast in advance.

PSP has two key fundraising programs, Individual giving (Face to Face, DRTV, Digital) and Leadership giving (corporates, foundations and major donors). It is actively fundraising in Spain, Italy, Germany, Sweden, UK, US, Canada, Hong Kong, Thailand, Philippines, Australia, Japan, Netherlands, France, MENA (Middle East and North Africa), Brazil, Mexico, and South Korea.

In addition to the above mature markets, UNHCR is identifying new fundraising markets such as Turkey, Denmark, Malaysia, Poland and China where potential is great.

UNHCR vision is to raise 1 billion USD from 5 million donors where 50% of individual giving income (30% of total income) comes through digital channels and 10 million supporters in 100 countries raising their collective voice for refugees.

This ambition is anchored on a clear focus on digital where UNHCR looks first for digital opportunities in everything it does, locally and globally. UNHCR’s global investment will prioritise rapid expansion of digital supporter recruitment, engagement and retention.

Email marketing and marketing automation play a critical role in this digital first strategy hereby enabling UNHCR to reach to its supporters and donors in a timely, cost effective, segmented and personalised fashion.
Email is one of the primary digital channel used to drive traffic organically to both fundraising and engagement platforms, and remains one of the highest converting digital channels in terms of donations.

UNHCR is looking for a marketing automation system which integrates with local and global databases, specifically Salesforce, enabling the headquarters and local offices to send targeted emails and build automations in order to retain, upgrade and engage with donors and supporters.
The marketing automation system is intended to bring significant benefits to the UNHCR email marketing strategy, support best-in-class email marketing practices (AB test, triggered send automations, behavioural email journeys…) and ensure full visibility on the performance of emails and automations in order to constantly optimise this digital channel and contribute to the aforementioned objectives.

It is also intended that this system will be a 'best of breed' system that is flexible enough to cover all international markets and is supported by a long term development roadmap for new features and investments.

UNHCR is aiming to boost online contributions to UNHCR globally and amplify voices for refugees online to deliver long-term sustainable solutions that provide security, dignity and a future for refugees. With our strategy of 'Digital First' we will look first for digital opportunities in everything we do, locally and globally. Our global investment will prioritise rapid expansion of digital supporter engagement and online donations are expected to deliver dramatic and sustained growth of donor recruitment programmes.

This project has been initiated by UNHCR's Division of External Relations (DER) in order to ensure that UNHCR has a frame agreement/s in place with an email marketing automation provider/s to enable our rapid growth of online donations.

1.1 Background

- In 2017 we expect more than eight percent of UNHCR revenue will be generated from private sector sources through the fundraising and engagement activities of the global network of six National Partners and several country and regional offices.
- In all UNHCR has private sector fundraising operations in 27 markets.

1.2 Statement of Purpose & Objectives

UNHCR is a global organisation, and as such any new system would need to provide a secure and flexible global email marketing and marketing automation system which enables to send emails, build donor journeys, manages leads and is able to integrate with local and global databases, specifically Salesforce Sales Cloud which is used by 13 markets.

The system needs to be securely hosted, easy to use (by both digital savvy and non-savvy marketers and communication specialists), error free, flexible has the potential to substantially increase donor loyalty and maximise funds raised via emails globally.

An internal team within the Digital Engagement Section based in Copenhagen will be assigned to the project; as such there may be multiple contacts for the agency. The role of the internal team will be to provide input and approval on platform functionalities, to act as intermediary between national offices and the bidder and to bring functional and/or technical knowledge of UNHCR to the bidder team as needed.

The successful bidder(s) is expected to be awarded a Frame Agreement for the duration of three years, with up to two years possible extension.

2 Requirements

2.1 Core requirements

UNHCR is looking to secure a global email marketing and marketing automation system provider.

The global email marketing and marketing automation system will be a ‘best of breed’ system that is flexible enough to cover all international markets and is supported by a long term development roadmap for new features and investments.

The system would need to be a robust, easy to use (by both digital savvy and non-savvy marketers, data analysts and communication specialists), error free, flexible and quick email marketing system that has the potential to deliver timely, relevant content which can ultimately substantially increase conversion rates and number of donations coming from emails globally.

The system must meet the below core requirements which have been grouped as follows:

CRM (Salesforce Sales Cloud primarily) and third-party integrations
Email and lead nurturing
Lead Management
Social media lead scoring & listening
Landing pages, forms and surveys
Campaign management
Analytics, reporting and tele-marketing enablement
Service Levels, support and training
Management of the platform
Security & compliance with data protection highest standards

2.1.1 CRM (Salesforce Sales Cloud primarily) and third-party integrations

The email marketing platform should be synchronised with any type of CRM system, specifically Salesforce.com which is used by a majority of UNHCR offices but not limited to it, as other offices are using other CRM systems such as Razors Edge, Charitable, etc. or in-house databases.

When we refer to the CRM system it encompasses a variety of databases, constantly evolving, with multiple owners and multiples data structures.

The integration with the CRM systems should cover the following requirements:

- Ability to integrate CRM system(s) to the platform with little to no technical knowledge. If technical knowledge is required, a clear and transparent support is provided in order to integrate with the various CRM system(s) in use at UNHCR in terms of:
  - Timing: how long building integration(s) take and the various steps required to achieve it including identification of technical dependencies
  - Technical support: how much help can be given, size and scope of the technical support (training, guidelines, live support, specialists…)
  - Budget: how much integration costs are covered by the email marketing platform provider (low, medium, high)
  - Type of CRM systems possible to integrate: what are all the CRM systems that can be integrated with the email marketing platform and the level of difficulty to integrate each of them
- Ability to control the leads that are passed to the CRM system(s).
- Ability to leverage any field, data point in the CRM system(s) by the email marketing platform, including cross-filtering, rolling date, etc.
- Ability to leverage a report run in the CRM system(s) by the email marketing platform.
- Ability to update automatically the CRM system(s) from the email marketing platform with lead, contact, opportunity, account information, behavioural information and vice and versa.
- Ability to link seamlessly the information about a lead or a contact’s interaction with marketing activities to the record in the CRM system(s) such as opt-in, opt-out, unsubscribe, open rate, bounce, click through rate, survey answer, etc.
- Ability to use the details from our CRM contacts or accounts to segment our database for marketing purposes (email, landing pages, etc.), specifically for automations and personalised emails.
- Ability for telemarketing or face-to-face people (equivalent of sales) and donor care people (equivalent of customer service) to add contacts and leads into a lead nurturing campaign from within the CRM system(s).
- Ability to de-duplicate leads between CRM system(s) and email platform by matching on email addresses and or tracking information.
- Ability to respect the data permissions of the CRM system according to the login credentials supplied (for example if a user cannot see certain records in the CRM, the same user should not be able to view information from those same records on the Marketing Automation platform)
- Access to an open API for product integration.
- Access to a wide range of native integrations such as email rendering testing tool such as Limus, webinar, call tracking, survey, video, e-commerce platforms, etc.
- Ability to integrate the email marketing platform with Google Analytics and BigQuery in order to track the performance of each email and campaign in terms of fundraising and awareness via:

- Ability to customise Google Analytics utm codes both by email and individual links (CTAs) in emails
- Ability to insert tracking and tagging codes to emails either individually or in batches at a campaign level or account level
- Ability to measure the conversion rate of each individual email by tracking the donations made on donation landing pages (external CMS used by UNHCR) and feed back the information to the email marketing platform
- Ability to measure the conversion rate of each individual email by tracking the behaviour of email recipients on either unhcr.org or social media posts and feed back the information to the email marketing platform
- The tracking of conversions and behaviour has to work without having url parameters in links that includes PII information like email address.

A detailed explanation of how the email marketing platform integrates with Salesforce.com on all the above points is required.

2.1.2 Email and lead nurturing

The email marketing platform offers lead generation and optimisation tools to help UNHCR build its email database, increase engagement of existing contacts and maximise funds raised via emails.

The functionalities expected are as follows:

- Ability to personalise the sender and recipient information of any email.
- Ability to dynamically change the email content based on the recipient's past behaviour, patterned interests and psycho-demographic data.
- Ability to learn when is the right time (day, hour) to send emails based on past behaviour and adjust it automatically based on the time zone of the contact.
- Ability to add personalisation to the subject line, body copy and visual of an email such as demographic, behavioural information or any information we have stored in our database.
- Ease of use of the platform, ease of building and editing emails:
  - Usability of the platform, ease of navigation
  - Drag and drop of content blocks
  - WYSIWUG email editor
  - intuitive interface
  - Flexibility of the template building
- Access to a variety of customisable and mobile optimised templates to choose from
- Ease of editing and customising these mobile-optimised templates without needing to know HTML or CSS
- Access to a spell check tool in a variety of languages including: English, French, Spanish, Japanese, Arabic, Turkish, Chinese simplified and traditional, Korean, Portuguese, Thai, Italian, German,…
- Ability to support UTF8 characters (such as Arabic with right-to-left text display and Chinese) in email templates, and reporting
- Ability to edit HTML and CSS of an email.
- Ability to customise emails in accordance to regional spam and opt-in requirements.
- Ability to preview live an email across all inbox types, email providers (per type and version) and mobiles devices
- Access to mobile optimised (mobile and tablets) and web responsive (automatically adjusts to different browser sizes) email templates by default
- Ability to perform A/B/C testing of email campaigns of a variety of criteria (from, subject line, timing, CTA buttons, content length, design, copy, visuals…) with the

platform automatically choosing the winner of the A/B/C test based on its relative performance and continue to send the most performing version.

- Access to reporting metrics such as delivery rates, open rate, click-through rate, churn rate, bounce rate and conversion rates for each email, at campaign level and at a user level.
- Ability to see the individual performance for every email campaign in a workflow
- Ability to trigger an email send based on a workflow or a form submission
- Ability to insert personalised fields based on a pre-existing data points from the CRM system (e.g. first name, country, last donation amount, last campaign …)
- Ability to schedule emails for a specific time and day, or depending on the time zone of a contact
- Ability to build recipient lists and suppression lists from within the email tool
- Ability to export instantly email metrics and performance into excel at any given time, and for any given time period
- Ability to organise emails by campaign
- Ability to tag emails individually and at campaign level
- Ability to search across the platform for emails, email versions, and assets
- Ability to sort emails, folders, renaming folder names using drag and drop
- Ability to adjust level of admin rights among various accounts owners
- Ability to see revisions and changes in an email over time and revert back to an older version if needed
- Auto-save of email content in case of technical failure of the platform and / or connection issues so updates are not lost
- Ability to clone emails, email templates and campaigns
- Ability to get a high level overview of email / campaign performance via a user-friendly email / campaign dashboard
- Ability to send test emails (both plain text and rich text) to specific people or groups of people before a live send
- Access to an email subscription centre that enables recipients to subscribe to different lists and email types
- Ability for unsubscribed contacts to re-subscribe themselves back to an email list
- Access to the live preview while editing an email
- Ability to easily integrate social media buttons within an email template (including regional social media such as Line, WeChat…) with no advanced knowledge of HTML or CSS required
- Ability to see how many recipients clicked on specific links within an email and which recipients those were
- Ability to name and track the performance of each CTA button and each outbound link individually
- Ability to store email activity (sent emails, opened, clicked) in a person's contact record
- Ability to create lists of recipients who opened, clicked or bounced from a specific email, and either save that as a new list in the platform or export into excel (e.g. if we wanted to send a follow up to recipients who clicked on a certain link or send that list to sales) and exclude this list of recipients from other email communications
- Ability to see which email campaign drove the most traffic, leads and/or donations within a specific timeframe
- Support in helping UNHCR's dedicated IP addresses to quickly gain reputation – please provide the average SenderScore of your customer IPs over the last 12 months
- Ability to maintain UNHCR's branding on outgoing email domains and URLs on landing pages
- Ability to obtain dedicated, clean IP addresses and clear pricing to get these
- Access to proactive recommendations and email optimisation tactics within the tool, in terms of:

    - Time and date to send emails based on historical data
    - Content and subject line preference based on historical data and segmentation
    - Maximum number of emails sent per week depending on contact type and historical data
    - Deliverability: IP warm-up and whitelisting tactics
    - Any other
- Ability to send different types of emails, including transactional emails
- Access to a platform with a regular and thorough load testing, where the minimum requirement is 1000 concurrent users
- Ability to add multimedia content to emails including video, animated gif, pictures, photo galleries with captions in a flexible manner and render well across devices and email providers
- Ability to build donor journeys:
    - across multiple digital channels (email, social media and SMS)
    - automate the email send based on donor persona and historical data
    - including conditional sends, reminders, personalised fields and ABC tests
    - editable at any given time with versioning

2.1.3 Lead Management

- Ability to collect lead intelligence data about a lead's interests, behaviours, level of activity on our website
- Ability to route leads to telemarketing team based on geography, donor type, campaign type or other rule
- Description of which behaviours can be incorporated into a workflow (e.g. complete a form, download a specific content, click on a specific event…)
- Ability to automatically add a form respondent to an applicable workflow
- Clear description of the extent of the deep segmentation of our database possible thanks to the email marketing platform, specifically adapted to the non-profit context with donor retention and upgrade in mind as a core objectives
- Ability to segment based on how the lead joined UNHCR (form filled in, petition signed, page views, analytics events, etc.)
- Ability to use these segments to send emails, trigger automation, monitor contacts in social media, personalise website content and build reports
- Ability to save segmentation criteria for future use, to duplicate segments across various accounts
- Ability to prioritise segments, or place them in a hierarchy to avoid duplication of contacts in different segments for a particular mailing
- Ability to sum up contacts' interactions in the form of a lead score
- Ability to visualise lead score in a user friendly manner and build reports on the scores
- Ability to calculate lead scores based on both implicit (e.g. website visits, form downloads, CTA clicks) and explicit (e.g. donor size, past donations, location, queries to donor care) data?
- Access to best practice templates for lead scoring
- Ability to use lead scores to automatically add a lead to a nurturing campaign
- Ability to queue new questions in our forms to learn more about our contacts over time
- Ability to integrate our contact information with our CRM system automatically

2.1.4 Social media lead scoring & listening

- Ability to create, schedule and publish social media posts across various social media accounts
- Ability to schedule social media posts in bulk
- Ability to initiate and continue conversations across multiple social media networks without leaving the platform
- Ability to publish messages, monitor streams and stay connected to social media account from a mobile device
- Access to a URL shortener when publishing a link on social media
- Ability to determine which content resonates among our audience through likes, shares, retweets etc. on our social media accounts
- Ability to view performance of social media publications via access to analytic dashboard in order to specifically identify the posts that are generating interactions, visits, leads and donations
- Ability to identify the a contact's social engagement with UNHCR, and use this information in the lead scoring
- Ability to see who is in our database when engaging with someone on social media
- Ability to set up trigger email alerts when a contact mentions UNHCR or a keyword on social media
- Ability to give telemarketing real-time alerts of their hottest leads' social behaviour (based on CRM data)
- Ability to create keyword monitoring streams in various language and alphabets

2.1.5 Landing pages, forms and surveys

- Ability to create a landing page, a form and a survey with little technical and design knowledge, based on WYSIWYG principle
- Ability to customise a call-to-action button, a landing page, a form, a survey, a thank you page or follow-up process with little technical and design knowledge
- Access to a variety of templates for landing pages and forms which are mobile responsive and mobile optimised by default
- Ability to lock certain modules of templates so they cannot be editable
- Access to a drag and drop interface for the form and landing page creator tool
- Ability to edit images directly within the platform for actions such as crop and resize, overlay text and stickers, apply filters, etc.
- Ability to embed forms and surveys in any other digital platform: within emails, third-party websites, UNHCR websites and donation landing pages
- Ability to display photo, video and text content inside a landing page and to add social share buttons
- Existence of a spell check
- Ability to edit HMTL and CSS for the landing pages and the forms
- Ability to preview landing pages and forms on multiple devices
- Ability to personalise landing pages to include a lead's profile information or offer different content based on a lead's interest
- Ability to build CTAs that change based on the lead's profile, interests and lifecycle stage
- Ability to set an expiration date and time on our landing page
- Ability to generate user friendly URLs using UNHCR domain name and unique URLs for each exit page
- Ability to organize and sort landing pages, forms and survey in folders, to rename, change and delete them as often as required

- Ability to feature progressive profiling inside the forms, to assign any field as mandatory or optional, to showcase error message for mandatory fields, Global telephone number/address validation (AVS) using number structure and address formats via an international data base to reduce typing errors and user mistakes (country specific)
- Ability to pre-populate lead data that has already been collected and stored in ourCRM system
- Ability to set form fields to have default values
- Ability to prohibit certain email addresses based on their email domain such as free providers (e.g yahoo.com, hotmail.com, etc.)
- Ability to send all data back from the form or survey into Salesforce, any CRM system
- Ability to easily perform ABC testing of landing pages and CTAs, including identification and activation of the winning version
- Ability to see revisions and changes of a landing page overtime and revert back to an older version if needed
- Ability to get data on performance of the landing pages and identification of which drove the most visits, leads and donors

2.1.6 Campaign management

- Ability to manage campaigns across all following digital channels: emails, SMS, app push notification and social media with one centralise view enabling multi-channel activation, audience management
- Ability to integrate other channels in the campaign management such as telemarketing
- Ability to view and analyse all marketing assets of a campaign in one central location
- Ability to evaluate the performance of our campaigns (e.g. contacts, leads, revenue generated, etc.) across all channels used
- Ability to set and track goals for campaign
- Access to one common interface for every content tool
- Access to a visual for our campaign flow
- Ability to upload a content that has already been made into a campaign
- Ability to see who is in each stage of a campaign in real-time
- Ability to sync completed forms in a campaign with CRM campaign for enhanced reporting
- Ability to trigger a webhook for easy integration with third party systems
- Access to guidance from the platform on what to include in a marketing campaign, when to send messages etc. based on industry best practices, previous campaigns and data available
- Access to campaign templates for plug-and-play campaigns
- Ability to organize and sort campaigns in folders, to rename, change and delete them as often as required

2.1.7 Analytics, reporting and tele-marketing enablement

- Ability to get access to integrated metrics that span our contacts database, marketing content and landing page traffic
- Ability to view all marketing channels and their individual performance in a central location
- Ability to report on any metric in our database
- Ability to perform a data analysis without leaving the tool

- Ability to see consumption of emails, landing pages or any other services in real-time in the platform, and against what has been agreed in the contract
- Ability to identify the influential emails or forms that generated clicks, leads, contacts
- Ability to measure leads
- Ability to report on the number of contacts who converted at different stages of the funnel, and across our different sites (unhcr.org, donation landing pages, social media…)
- Ability to determine how much revenue we have generated from our contacts via the email marketing platform, at a donor level
- Ability to cluster this data at a geography level, segment level, or any time type of format to enable in depth analysis
- Ability to determine how much revenue we have generated from different marketing efforts
- Ability to run competitor reports to see how we stand in terms email performance and conversion versus our main competitors
- Ability to access our reports and analytics on mobile device
- Ability to export analytics data to excel in real time, supporting various languages
- Ability to automate reports so they can be sent automatically to leadership or specific managers / telemarketing agents, at whatever frequency we prefer
- Ability to automatically email reports to others on a certain date or time
- Ability to run attribution models to figure out what content or sources contribute to the most conversions throughout the funnel, specifically via integration with Google Analytics and BigQuery
- Ability to do revenue reporting through an integration with any CRM system
- Ability to run pre-built reports based on best practices in data analytics
- Ability to access to analytics data from 12 months back
- Ability to request analytics data for any email marketing activity with no date restrictions
- Ability to apply any filter when exporting analytics data (language, office, date, channels, segment, AB test results, campaign type, …)
- Ability for sales / telemarketing team to receive real-time alerts on lead behaviour and activity
- Ability to deliver these alerts via email, text message, and desktop notifications to reach sales / telemarketing wherever they are
- Ability to monitor all interactions the prospects have with our content in one central location
- Ability to be notified as soon as an email is opened or clicked
- Ability to see how many times an email was opened
- Ability to see where in the world an email was opened
- Ability to see whether an email was opened on a desktop or a mobile device
- Ability to be notified when a prospect enter our site
- Access to a comprehensive view for sales / telemarketing of every interaction a prospect has had with all digital assets sent by UNHCR, but also clicks on website and social media interactions
- Ability to see some data for anonymous prospects such as location, contact information, behavioural information… all within a web browser

2.1.8 Service Levels, support and training

Full specifications will be required on appointment of supplier – the following is a basic guide only:

- Access to fast, global, efficient and flexible account management, (ability to ‘scale up and down' hosting capacity quickly and easily for major appeals or in case of large partnership, unexpected subscriber base growth)

- Access to 24 hour support desk on request and full prioritisation processes for bug fixes and technical queries
- Access to one point of contact for our entire customers lifetime, with dedicated time and focus on UNHCR for global and local queries (with a clear need for global support on European time zones, and local ones on Asia, Middle East, Europe and Americas)
- Access to a fully documented user specifications which is updated regularly
- Access to automated and fully documented process/procedure for error monitoring and logging
- Access to clearly communicated SLAs
- Ability to receive instant notifications in case of functional failure, and/or emails not being sent, and access to a back-up service / platform until the service is back again
- Access to a strong service provision in relation to downtimes/response times
- Account management, technical support team and on-going training
- Access to varying levels of support and training packages
- Access to personalised training opportunities and on-boarding programme for new recruits available at any given time
- Access to free training videos, classes and workshop covering all areas of the funnel (content, lead gen, nurturing, sales / telemarketing alignment…)
- Access to clear SLAs
- Access to unlimited and free access to web, phone, email and Twitter account, across all time zones
- Access to a portal of training resources (webinars accessible in all time zones, worksheets, classes,…)
- Access to international user groups that we can join to discuss about the platform, share ideas and best practices
- Access to a network of partners to help enable growth through proven strategies,, specifically tailored for non-profit organisation

2.1.9 Management of the platform

- Access to an admin center, allowing limitless number of users and account
- Ability to quickly rename and/or re-assign accounts and users within the organisation
- Ability to personalise and adjust the structure for the various accounts with different admin rights and accesses to features and services,
- Ability to control the platform centrally as well as ability to enable decentralisation for specific offices (accounts) and/or individual users
- Ability to access activity history via user login
- Ability for admin user to switch between accounts instantly and have complete overview over account activity
- Ability to share best practices, learnings, templates, content between accounts and instantly
- Access to a flexible and user-friendly platform with as few clicks as possible to perform a task
- Access to a platform supported by all standard browsers: IE, Firefox, Chrome, Safari

2.1.10 Security & compliance with data protection highest standards

- Access to clear guidance, explanations and help in understanding and complying to 2018 EU Data Protection regulation standard, including but not limited to:
  - Preference center management providing clear visibility to the subscribers over their opt-in, opt-out preferences, unsubscribe both
  - Data management of unsubscribe
  - Double opt-in best practices at a country level
  - Any other email marketing / marketing automation best practices
- Access to secured servers hosting all UNHCR data
- Access to different servers for hosting data of different accounts if required (data of national associations have to be separated from UNHCR offices)
- Ability to ensure data available about donors or prospects are secure and held according to international data protection laws
- Access to automated and fully documented process/procedure for disaster recovery process

2.2 Expected role of the bidder for the performance of the key requirements

2.2.1 The Expected Role of the Bidder

The bidder is expected to give details and demonstration of the functionalities and technical requirements of the solution.

The bidder is expected to provide a Focal Point to lead collaboration with the UNHCR regional teams/ Global Project Managers.
Similarly, the bidder will be asked to assist the UNHCR team with the transfer of applicable functional and technical knowledge to UNHCR resources.
The bidder is also expected to give details of the skill sets to support the project including on-going requirements from UNHCR. The bidder is requested to clearly state any assumptions of deliverables, facilities or resources they expect UNHCR to provide.

The desired provider should have:

- Relevant experience with non-profits and/or organizations with similar goals
- Relevant experience with delivering email marketing and marketing automation systems with non-profit and/or organizations with similar goals
- Relevant experience in integration with third party CRM systems (both local and global) and specifically Salesforce Sales Cloud
- Relevant knowledge of digital marketing, multichannel campaigns, marketing automations and lead management
- Relevant experience of online conversion and optimisation techniques and best practice for email marketing and marketing automations

2.2.2 Risk Management

The bidder will assume a direct responsibility for risk management to the extent that project deliverables should not be imperilled. To this end, the bidder will work with UNHCR project management to ensure that risk is at all times identified in a timely manner, and managed to ensure that the project is not adversely impacted. Appropriate documentation will be maintained for UNHCR project management.

2.3 Customer Responsibilities

UNHCR is responsible for providing the following:

- Liaising with the Contractor, attends regular project management calls and meetings
- Assigning a dedicated project manager and liaising internally with key stakeholders
- Reconciling reports submitted by the Contractor
- The Digital Engagement team will be the main point of contact initially, with other teams being introduced as needed. Some regional fundraising offices around the world might become the main point of contact for the agenc(ies) local account service teams.

3 Content of the Technical Offer

Your Technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

3.1 Company Qualifications

- A description of your company with evidence of your company's capacity to perform the services required, including: Company profile, registration certificate, security certificates, and last audit reports
- Year founded
- If a multi-location company, please specify the location of the company's headquarters, and the branches that will be involved in the project work with founding dates;
- Experience in the business or the number of similar and successfully completed projects
- Number of similar projects currently underway;
- Any relevant experience working with UNHCR, other UN Agencies and NGOs should be included;
- Total number of clients, please provide a list;
- You are requested to provide three (3) references that we may contact from your current client list
- Security certificate

3.2 Proposed Services

Please submit a written proposal outlining:

- How you intend to develop the above mentioned services as per requirements stated in section 2.1 and 2.2),
- Timescales of delivery of work project.

3.3 Personnel Qualifications

A list of the core staff to be assigned to this project for any technical support/set up, ongoing account management, and global training support.

Clear SLAs are expected: quality of the support, availability and responsibilities.

3.4 Vendor Registration Form

If your company is not already registered with UNHCR, please complete, sign, and submit with your Technical Proposal the Vendor Registration Form (Annex C).

3.5 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D) on the RFP Checklist Form (Annex F) and including it in your submitted Technical Proposal.

4 Evaluation

4.1 Technical Evaluation

The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: **70%** from the total score.

CRITERIA DESCRIPTION	**Score**
1. Company Qualifications	
General Liability/Capacity of the Company	10
Experience of providing a robust email marketing and marketing automation platform for NFP's, UN Agencies and international clients (multi language).	5
2.Proposed Services	
Comprehensiveness of email functionalities, ability to manage multichannel campaigns (including SMS) and in-depth reporting capabilities. Frequency of updates and improvements to the system, clarity over roadmap.	10
Ease of use and user friendliness of the platform.	5
Lead management capabilities (incl. scoring from SMS and social media) and enablement for telemarketing.	2.5
Security of proposed service and hosting abilities, robustness of risk management processes and data protection systems. Ability to scale up email volume.	2.5
Ease and level of experience of integration with Salesforce Sales Cloud and any other databases. Detailed overview of synchronization between the two, list of possible integrations and support provided.	10
Quality of proposed services and the platform offered based on the written submission and on the WebEx presentation / demonstration.	5
3. Personnel Qualifications	
Experience, service and availability of core people (account management) at global and local level including clear access to training, documentation and strategic advising.	10
Effectiveness, availability of support teams including clarity of Service Levels agreement (SLA's).	10
TOTAL TECHNICAL SCORE (Max = 70; Min 42)	**70**

Agencies passing a minimum of 10 out 15 score for ‘Company Qualifications’ will be invited to participate and deliver a WebEx presentation of their proposal and to introduce the team members who will work with UNHCR. This is expected to be one hour maximum. This presentation will form part of the technical evaluation.

The minimum passing score is 42 out of 70 points; if a bid does not meet this minimum it will be deemed technically non-compliant and will not proceed to the financial evaluation.

5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier according to the following KPIs:

- Delivery of commissioned work on schedule
- Quality of product and service
- Compliance with agreed SLAs
- Limited downtime, specifically when rolling out new features
- Quality and speed of the support provided in case of:
    - technical failure,
    - down time (including fall back options and instant notifications),
    - infringement on white listing,
    - issues related to integration with Salesforce Sales Cloud,
    - or any other type of service issues
- Flexibility, quality and proactivity of the account management both at global level and local level (with any specific local office) specifically in terms of:
    - upscaling the number of users / email sends / page impression etc.,
    - facilitating quoting and invoicing,
    - recommending and enabling new ways to work and to improve email conversion rate
- Robustness of the platform to sustain high deliverability rate, specifically in case of high and sudden growth of email sends and number of users globally. Ability to quickly and massively increase email send capacity in case of sudden lead generation / engagement campaign opportunity.
- Clear and defined upgrade and improvement roadmap of the platform
- Quality of guidance and training to help UNHCR become more effective and efficient in terms of:
    - data segmentation,
    - email optimisation (single sends and automations)
    - and multichannel usage
- Ability to support the set-up of a lead generation model.