



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

The following questions were received by the Export Credit Insurance Corporation of South Africa (SOC) Limited (ECIC) on the abovementioned bid, and are hereby responded to as follows:

No.	Question	Reference	Response
QUESTIONS FROM THE BRIEFING SESSION HELD ON 23 JUNE 2026			
1.	In the case where we are the OEM of the proposed solution, how do we deal with the mandatory requirement for an OEM letter/confirmation of partnership? Thank you	Section 15 of the RFP	An OEM bidding for ECIC04P-2026_27 is required to provide a letter declaring OEM status and proof that they are an OEM.
2.	2.1. Can a partner subcontract part or all of the project work to another partner? If yes, can the subcontracted partner be registered or recognized with the OEM for the purposes of project delivery, certifications, support, or compliance requirements?	Section 24.3 of the RFP	Subcontracting – The bidder must be registered or recognised with the OEM for the main product quoted for. The bidder must not be just a broker between ECIC and implementation contractors. Subcontracting will be managed in accordance with section 24.3 of the RFP.
	2.2. Can integrated third-party products (portal, chatbot, digital signature, etc.) be included as part of the solution?	91.1 to 93.1 of Annexure C – Self Evaluation	Integrated third-party products can be utilised as part of the solution. However, Annexure C must be completed correctly. The most correct scorable option must be selected. Refer to 91.1 to 93.1 of Annexure C – Self Evaluation.
	2.3. Is the Chatbot required in Phase 1 or can it be delivered in Phase 2?	Section 8.3.2 of the RFP (Self-Service Capability)	Chatbot and Customer Portal are listed as Phase 2 requirements under self-service capability in section 8.3.2 of the RFP.
	2.4. Is data cleansing and deduplication expected from the bidder or ECIC?		Data cleansing and deduplication are expected to be an ECIC exercise. The bidder is expected to provide a template to be used to capture and import data to the



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QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
			new system (the successful bidder will import the data to the new system).
	2.5. Is Social Media Integration required in Phase 1 or can it be delivered in Phase 2?	Section 8.3.1.1.4 of the RFP	Social media integration is a Phase 2 requirement, as stated in 8.3.1.1.4 (page 16 of the RFP). However, this may be delivered as phase 1 – to be discussed with the successful bidder based on product capability
	2.6. Is the Customer Portal required in Phase 1 or can it be delivered in Phase 2?	Section 8.3.2.3 of the RFP	Customer portal is a Phase 2 requirement – section 8.3.2.3.
3.	3.1. Can we still share questions, as stated in the doc, after this Briefing session?	Section 22.1.2 of the RFP	Yes, as per the tender document. Closing date for questions was 30 June 2026
4.	4.1. If there is a feature that is available readily in the platform, but has to be subjected to light configuration to personalise it to ECIC Requirements, should it be listed under Standard Feature or Configurable?		Select the most correct option based on the guide below: Standard Feature – Available out of the box and can be used immediately without any configuration or changes. So, a readily available feature that can be used as is, but is subject to light or minor configuration to personalise it, is viewed as a standard feature



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			For example: light personalisation could be changes to labels, terminology, dropdown list values, activation of the feature, user role, etc. – these are viewed as normal administrative setup. Configurable Feature – Available feature, but requires settings, parameters, workflow design, forms, templates, or business rules to be configured to meet your specific requirements. Customisable Feature – Requires development, scripting, coding, extensions, plugins, or modifications beyond standard configuration
5.	5.1. Can bidders demonstrate standard product capabilities, or is a custom proof-of-concept required? 5.2. Will ECIC provide specific business scenarios for the demonstration?	Section 17 (page 27 of the RFP)	At a minimum, Bidders must be guided by evaluation phase 4 to develop a demo and presentation. Standard capabilities, if they cover at least the minimum areas expected for the demo, will suffice. ECIC will not provide specific business scenarios.
6.	Please attach the process documents shared in the meeting with the responses to the questions that will be sent after the briefing session.		CRM process attached.
7.	May we please receive the current and envisioned process document so that we can be able to tailor our proposals based on the envisioned process		Refer to the response above for question 6, the CRM process attached



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8.	When sharing the answers to questions please share any and all integrations and systems to be integrated to as well as if there are API's or connection points to connect to for those systems. Thank you	Page 16 of the RFP – Section 8.3.1	The list of integrations includes at least the following: • Outlook email and calendar integration. • IFW (https://industrialfinancing.co.za) portal integration of similar DTIC portal. • Bulk SMS to be provided by the ECIC if the proposed solution does not have a built-in SMS function • Insurance Management system (yet to be implemented – integration points will be defined once the insurance to-be processes are finalised. • Social media integration – such as WhatsApp, FaceBook and LinkedIn) • MS PowerBI (Licenses to be provided by ECIC) • Digital Signature, such as DocuSign ** More integrations may be defined and quoted as part of Phase 2. **For more details, read together with a response for 19.26 below.
9.	Which functionality is expected to go into production at the conclusion of phase 1 of the project? Thank you	Full Phase 1 requirements: 7.1 to 7.1.1.11 (Pages 7 – 15)	• Phase 1 on deployments: • Priority 1 (By 31 March 2027): • Minimal viable product (MVP) of Phase 1 consisting of at least Leads and Complaints management functionality. MVP must be usable by 31 March 2027.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
			- The successful bidder will engage with the ECIC on the statement of work to confirm MVP functionality. Priority 2 - Complete the rest of Phase 1 functionality Priority 3 - Phase 2 deliverables such as Portal, chatbot, integrations and others. Reporting, Security and applicable privacy requirements must be delivered from MVP onwards

QUESTIONS FROM EMAILS

10.	Good day Procurement, I hope this mail finds you well. I would just like to confirm whether the non-compulsory briefing session is still taking place, as we have not been accepted in the session yet. Thanking you in advance. Kind Regards		The non-compulsory briefing session was held on 23 June 2026. This document augments the discussions in the briefing session by providing clarity to the questions asked during and after the briefing session. The recording of the non-compulsory briefing session is available from the following link: https://www.ecic.co.za/wp-content/uploads/2026/07/ECIC04P-202627-AUTOMATION-OF-CRM-PROCESSES-INCLUDING-SUPPORT-AND-MAINTENANCE-FOR-A-PERIOD-OF-THREE-YEARS-NON-COMPULSORY-BRIEFING-SESSION-20260623_113209-Meeting-Recording.mp4
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QUESTIONS AND ANSWERS	

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11.	Good day Procurement team, I hope this mail finds you well. May you please advise whether the non-compulsory briefing session will be rescheduled. Kind Regards Good day, Please note that we have been trying to join the briefing session for the tender ECIC04P-2026/27 - AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS, using the link provided on the bid document. However, it says the meeting has not started and the meeting was supposed to start at 11:00.		The non-compulsory briefing session was held on 23 June 2026. This document augments the discussions in the briefing session by providing clarity to the questions asked during and after the briefing session. The recording of the non-compulsory briefing session is available from the following link: https://www.ecic.co.za/wp-content/uploads/2026/07/ECIC04P-202627-AUTOMATION-OF-CRM-PROCESSES-INCLUDING-SUPPORT-AND-MAINTENANCE-FOR-A-PERIOD-OF-THREE-YEARS-NON-COMPULSORY-BRIEFING-SESSION-20260623_113209-Meeting-Recording.mp4
12.	Good day SCM, I hope you are well. I am currently waiting in the virtual lobby to be admitted to the briefing session. Could you please advise if there have been any changes or if there is an issue with my access?		The non-compulsory briefing session was held on 23 June 2026. This document augments the discussions in the briefing session by providing clarity to the questions asked during and after the briefing session. The recording of the non-compulsory briefing session is available from the following link: https://www.ecic.co.za/wp-content/uploads/2026/07/ECIC04P-202627-AUTOMATION-OF-CRM-PROCESSES-INCLUDING-SUPPORT-AND-MAINTENANCE-FOR-A-PERIOD-OF-THREE-YEARS-NON-COMPULSORY-BRIEFING-SESSION-20260623_113209-Meeting-Recording.mp4



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

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13.	Dear Procurement, Please advise if the briefing session for ECIC BID NUMBER: ECIC04P-2026/27 is still taking place, as we have accessed the session via the link shared in the bid document and are currently still waiting to be let into the meeting. Your urgent response is appreciated. Thank you.		The non-compulsory briefing session was held on 23 June 2026. This document augments the discussions in the briefing session by providing clarity to the questions asked during and after the briefing session. The recording of the non-compulsory briefing session is available from the following link: https://www.ecic.co.za/wp-content/uploads/2026/07/ECIC04P-202627-AUTOMATION-OF-CRM-PROCESSES-INCLUDING-SUPPORT-AND-MAINTENANCE-FOR-A-PERIOD-OF-THREE-YEARS-NON-COMPULSORY-BRIEFING-SESSION-20260623_113209-Meeting-Recording.mp4
14.	Good day, I am waiting to be admitted into the briefing session for the bid referred to above. May you kindly advise if it is still on or if the link has been changed? Regards,		The non-compulsory briefing session was held on 23 June 2026. This document augments the discussions in the briefing session by providing clarity to the questions asked during and after the briefing session. The recording of the non-compulsory briefing session is available from the following link: https://www.ecic.co.za/wp-content/uploads/2026/07/ECIC04P-202627-AUTOMATION-OF-CRM-PROCESSES-INCLUDING-SUPPORT-AND-MAINTENANCE-FOR-A-PERIOD-OF-THREE-YEARS-NON-COMPULSORY-BRIEFING-SESSION-20260623_113209-Meeting-Recording.mp4



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15.	Good morning, 7.1 Could you please clarify Annexure B - Format for fee proposal. 7.2 The Annexure B: Format for fee proposal (Pricing Example) is BLANK. Below is a snippet what is depicted on the Annexure B Annexure B: Format for fee proposal (Pricing Example) This page has been left blank intentionally. Refer to the attached document titled Annexure B (Format for fee proposal (Pricing Example)).		The blank page on page 40 of the RFP states at the top that “this page has been left blank intentionally. Refer to the attached document titled Annexure A (Formation for fee proposal (Pricing Example)) The pricing example is Annexure B. The pricing template can be found from this link: https://www.ecic.co.za/wp-content/uploads/2026/06/ECIC04P-2026_27-Annexure-B-Pricing-template.docx Alternatively, it can be accessed from this link: https://www.etenders.gov.za/home/Download/?blobName=aa3afb61-5c27-4165-9535-3a70f56cc218.docx&downloadedFileName=ECIC04P-2026_27%20Annexure%20B%20Pricing%20template.docx
16.	Digital signatures support	Section 4.10 (page 5 of the RFP) Sections 7.1.1.9.3 and 7.1.1.9.4 (page 14 of the RFP). 46.1 Annexure C	ECIC utilises DocuSign™ for internal business process. As per 7.1.1.9.3 and 7.1.1.9.4 the bidders must describe digital signatures supported (native or third-party integration). If third-party digital signatures are used, the bidder must quote and/or indicate integration capability with



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			DocuSign. The ECIC will either purchase proposed signatures or purchase its own DocuSign signatures. Except for the monthly volumes of complaints and leads mentioned in the background, the total volumes of signatures required annually are unknown and will be firmed up in Phase 2. The volumes can be used as a guide for quotation purposes. Most importantly, the bidder must complete the pricing template and select the most accurate option in relation to digital signatures (refer to Annexure C – Self Evaluation, 46.1) ***Read together with a response for 18.6 below



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17.	Good day Procurement Team, Thank you for the opportunity to participate in the above-mentioned tender process. In preparing our response, we would appreciate your assistance with the following queries to ensure that we are able to submit a comprehensive and accurate bid: 17.1. Kindly advise whether the non-compulsory briefing session, which was scheduled for 23 June 2026 and did not take place, will be rescheduled. In terms of paragraph 22.1.2 of the Terms of Reference, [XXXX, name redacted by ECIC] respectfully submits the following requests for clarification in respect of the above bid. All paragraph references are to the Terms of Reference unless a specific Annexure is stated, and each question references the applicable paragraph in line with paragraph 22.1.3.		The non-compulsory briefing session was held on 23 June 2026. This document augments the discussions in the briefing session by providing clarity to the questions asked during and after the briefing session. The recording of the non-compulsory briefing session is available from the following link: https://www.ecic.co.za/wp-content/uploads/2026/07/ECIC04P-202627-AUTOMATION-OF-CRM-PROCESSES-INCLUDING-SUPPORT-AND-MAINTENANCE-FOR-A-PERIOD-OF-THREE-YEARS-NON-COMPULSORY-BRIEFING-SESSION-20260623_113209-Meeting-Recording.mp4



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QUESTIONS AND ANSWERS	

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18.	18.1. 9.2. Checklist and Evaluation-Criteria Alignment Annexure D, items 2, 3, 4 and 5 (page 54) These checklist items reference "server hosting solutions," "a certified partner for the server virtualisation solution (e.g. VMware)," and a plan to "migrate and host ECIC servers." These appear to have been carried over from an infrastructure/hosting tender and do not align with the CRM scope in paragraph 6 or the pre-qualification in paragraph 15. Please confirm the correct CRM-relevant requirement for each item, specifically: 9.4. Item 2 - should the six key-resource CVs demonstrate experience in CRM implementation (per paragraph 16, Table 1, criterion 3) rather than "server hosting solutions"? 9.5. Item 3 - does the certified-partner proof refer to the CRM OEM (Microsoft) partner status required under paragraph 15.1, rather than a server-virtualisation (VMware) partnership? 9.6. Item 5 - should the project plan and methodology cover the CRM	Checklist Annexure D in the RFP document.	Error on the Checklist Annexure D. See updated Checklist – Annexure D in the RFP. This applies to questions from 9.2 to 9.7.



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QUESTIONS AND ANSWERS	

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	implementation (per paragraph 16, Table 1, criterion 4) rather than server migration and hosting? 9.7 Paragraph 16 (Table 1, criterion 1) and Annexure D, item 4 Criterion 1 requires references "where the proposed system (CRM) was implemented," while Annexure D item 4 refers to "similar services" and a minimum of three reference letters. Please confirm that (a) reference letters must demonstrate CRM implementations specifically, and (b) the scoring basis is up to five contactable references rated 0-5 per paragraph 16, notwithstanding the three letters stated in Annexure D item 4.		
18.2.	Scope and Phasing Paragraphs 4.9, 7.1.1 and Annexure B (MVP scope) Paragraph 4.9 states the MVP will "largely cover standard functionality for complaints management, leads management and limited Marketing capability," and the Annexure B "Implementation Phase 1" line lists Leads Management, Pipeline Management, Case Management and basic Campaign Management. Paragraph 7.1.1,	7.1 to 7.1.1.11 is Phase 1 (MVP forms a portion of this – ECIC pressure on leads and complaints as the first deliverable) 8.1. to 8.3.4 Phase 2	Phase 1 will be delivered in at least two production deployments: Priority 1 (By 31 March 2027): Minimal viable product (MVP) of Phase 1, consisting of at least Leads and Complaints management functionality. The complaints and leads management must be usable by 31 March 2027. The successful bidder will engage with the ECIC on the statement of work to confirm MVP functionality to be delivered out of the Phase 1 requirements.



BID NUMBER	ECIC04P-2026/27
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	however, also details Opportunity management and Sales (digital application forms and digital signature) under Phase One. Please confirm the definitive list of modules constituting the Phase One MVP - in particular, whether Opportunity management and the Sales digital application forms and digital signature functionality are required within the Phase One MVP, or are to be scheduled as Phase Two enhancements.		However, all the other functionality stated as Phase 1 requirements must still be delivered post 31 March 2027. Except where clarity is provided in this document, such as integrations, Customer Portal, and Digital Signatures, they are Phase 2 deliverables. Priority 2 Complete the rest of phase 1 functionality Priority 3 Phase 2 deliverables Reporting, Security and applicable privacy requirements must be delivered from MVP onwards
18.3.	Paragraphs 4.8 and 8.3.1.2 (dtic IFW integration) The dtic IFW API integration (industrialfinancing.co.za) is described as an intention in the Background but is listed under the "Phase 2 onwards" system-integration items in paragraph 8.3. Please confirm whether the IFW API integration falls within the Phase One MVP or Phase Two, and whether API documentation and specifications for the IFW platform will be made available to the appointed bidder.		IFW integration is a Phase 2 requirement as listed under section 8. API documentation will be obtained from the DTIC and made available to the successful bidder.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

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	18.4. Paragraph 8.3.1.4 (social media integration) Social media integration (WhatsApp, Facebook, LinkedIn) is stated as something that "may be implemented as either phase one or two - the bidder will be expected to guide." Please confirm whether ECIC expects this capability costed in Phase One or treated as a Phase Two enhancement for pricing purposes.	Annexure B Pricing template	Section 8 refers to Phase 2. Social Media integration is a Phase 2 deliverable. The pricing template contains a separate line item for Social Media integration and refers to Phase 2 (Professional services will be quoted as part of Phase 2, but subscription costs, if applicable, are to be indicated in the quotation).
	18.5. Paragraph 8.3.1.3 (bulk SMS) Please confirm whether the bulk SMS provider subscription cost is to be carried by the bidder and recovered or contracted directly by ECIC with the bidder providing the integration.	Section 8.3.1.1.3 of the RFP	Bulk SMS is for ECIC's account if the proposed solution does not have a standard SMS functionality (contracted directly by the ECIC). The most correct option in the self-evaluation referring to SMS functionality must be selected.
	18.6. Paragraphs 7.1.1.9.3 and 7.1.1.9.4 (digital signature) The system must provide digital signature functionality for customer applications, and bidders may use native or third-party methods. As this is typically delivered through a third-party e-signature service integrated with the CRM, please confirm: (a) whether ECIC has a preferred or existing e-signature provider; and (b) whether the e-signature subscription cost is to be carried		ECIC utilises DocuSign. Digital Signature to be for ECIC's account, preferably, if the solution uses a third-party solution or integrates with DocuSign. This is consistent with the bulk SMS approach. Otherwise, if DocuSign integration is not possible, the bidder should quote for the proposed solution. Complaints and lead volumes reflected in the background can be used as a guide for quoting, since the actual volumes to be catered for signatures will be discussed during Phase 2.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	by the bidder and recovered, or contracted directly by ECIC (consistent with the bulk SMS arrangement).		**Read together with a response to question 16 above
18.7.	Paragraph 5.3.6 (existing Dynamics 365 Finance and Operations) ECIC's current environment includes Microsoft Dynamics 365 Finance and Operations. Please confirm whether any integration between the CRM platform and Dynamics 365 Finance and Operations (for example, shared customer or account master data) is required within the scope of this engagement, and if so, in which phase.		Dynamics integration is a Phase 2 discussion.
18.8.	Paragraph 4.4 (future Insurance Management System) The Background notes that ECIC is separately sourcing an ECA-aligned Insurance Management System (IMS). Please confirm whether integration between the CRM platform and the future IMS is anticipated within the term of this contract, so that the solution architecture can be designed to accommodate it.		Yes, the procurement for the insurance system is planned for 2026/27FY with short-term insurance (STI) functionality planned for 2027/28FY.
18.9.	Data Migration Paragraphs 4.6 and 4.9 (data migration)		Complaints are on Excel, but due to low volumes, the ECIC can capture open complaints on the system. The



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	Approximately 4,000 contacts are to be imported from the existing in-house CRM. Please confirm: (a) the source format and the expected data quality of these contacts; and (b) whether the migration of historical complaints, leads, or documents currently stored in SharePoint and email is in scope for Phase One, or is to be addressed under Phase Two.		successful bidder can guide on the most optimal way to address this. Contacts: An estimated 4000 contacts, the ECIC will do the cleanup, but the successful bidder must provide a template to be used to import this data to the new system. It is anticipated that the template could be in CSV/Excel.
	18.10. Licensing and Pricing (Annexure B) Paragraphs 7.1.1.1.1 and 7.1.1.1.2 (licensing basis) The MVP anticipates up to 25 internal users, increasing to up to 35 users in Years 2-3 (Annexure B). The proposed Microsoft Dynamics 365 Customer Engagement platform is licensed on a named-user subscription basis and does not offer a concurrent or floating-user licensing model. Please confirm that named-user subscription pricing is acceptable to ECIC, and confirm the mechanism and notice period for increasing and reducing the number of licensed users on an annual basis (paragraph 7.1.1.1.2). 4Sight will propose an optimal mix of full and lighter		Named user licenses are acceptable. The mechanism for increasing licenses will include notifying the service provider of the additional license count. If the increase will be outside of existing approvals, ECIC will run its internal approval process for additional licenses. For fair comparison, please work on the annual licenses count provided for quotation purposes. Generally, few weeks to a month for an increase in licenses. For the annual commit we generally would review licenses annually if there is a need to reduce. It is, however, unlikely that licenses will be reduced as they will be loaded gradually on the system, aligning with the various production deployments.



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NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	(Team Member / limited access) licences to align licensing cost with actual usage.		
	18.11. Paragraph 8.3.4 and Annexure B (advanced Marketing licensing) Advanced campaign and event management (Phase Two) is typically delivered through Microsoft Dynamics 365 Customer Insights - Journeys, which is licensed separately from the core Customer Engagement (Sales / Customer Service) applications. Please confirm that a separate Customer Insights - Journeys subscription for the advanced Marketing capability is acceptable to ECIC, and that it may be treated and priced as a Phase Two subscription item.		Yes, that is acceptable and maybe priced as Phase 2 if the product license you are proposing is structured in that manner.
	18.12. Paragraph 8.4 and Annexure B (Phase Two rates) For the Phase Two time-and-material model, Annexure B provides for separate Year 1, Year 2 and Year 3 hourly rates. Please confirm the basis and any cap (for example, CPI) for the year-on-year escalation already provided for in the rate table.		Yes, the Phase 2 table seeks to understand hourly rates for the 3 years, which will include year-on-year increases as calculated by the bidder, which could be CPI projection-based. Once the project is in Phase 2, the successful bidder will provide a quotation for deliverables based on manhours required for those deliverables, which the ECIC will approve before implementation commences.



BID NUMBER	ECIC04P-2026/27
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	18.13. Annexure B (hypercare versus Year 1 support) The pricing template separately lists "Hypercare support for a period of three (3) months post Phase 1 MVP go-live" and "Year 1 support (SLA based)." Please confirm whether the three-month hypercare period runs concurrently with, and is included in, Year 1 support, or whether it is an additional charge preceding the Year 1 support term.		The contract will be 36 months from the MVP go-live date. The 36 months will include the hyper-care support, meaning it will run concurrently and possibly the first 3 months of year 1 support will have a higher cost. The intention of the hyper-care support is to ensure prompt support and handholding where necessary to ensure proper adoption while limiting end-user frustration related to support issues.
	18.14. Paragraph 9.1.5.2 (Power BI) ECIC will provide the Power BI licence(s). Please confirm the number and type of Power BI licences that will be made available for the solution.		Information will be available to the appointed bidder. There is a separate project where ECIC is reviewing the Power BI licenses across the organisation. Currently, ECIC has 10 Premium licenses
	18.15. Compliance and Assurance Paragraph 10.1.4 (ISAE / SOC 2) Annual ISAE / SOC 2 reports are required. For a SaaS solution, please confirm whether the OEM and hosting provider's ISAE 3402 / SOC 2 report (for example, Microsoft Azure / Dynamics 365) satisfies		OEM and hosting provider's ISAE 3402 / SOC 2 report will suffice. ECIC needs to have these annually so that they are available as and when our auditors ask for them. Bidder-specific can be provided if it's available, but the OEM and Hosting provider are the critical ones.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
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	this requirement, or whether a bidder-specific report is expected.		
	18.16. Paragraphs 9.1.1.11 and 16 (Table 1, criterion 2) - data residency Paragraph 16 scores the "location of data centres where the data is processed," and POPIA compliance is required throughout. Please confirm whether ECIC requires that personal and business data reside within the Republic of South Africa specifically, or whether another Microsoft data-centre geography (with appropriate cross-border safeguards under POPIA) is acceptable.		ECIC wants to understand the datacentre used to process and store its systems and data. POPIA compliance must still apply in cross-border as per section 72 of POPIA. ECIC just need an attestation explaining the location of datacentre, how your solution complies with privacy laws such as POPIA and/or GDPR and the Information Security standards your solution applies/ adopts.
	18.17. Paragraph 9.1.1.11 (Critical Personal Information) The system must hash "Critical Personal Information ... so it is not usable in the event of a data breach." Please clarify which specific data fields ECIC classifies as Critical Personal Information. We note that, within the proposed platform, this protection is typically achieved through field-level security, encryption at rest, and data masking rather than one-way hashing (which would render the affected fields		Field-level security, encryption at rest, and data masking will suffice.



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NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	unusable for search and display). Please confirm whether such equivalent controls satisfy the requirement.		
	18.18. Support and Service Levels Paragraph 9.1.4 (support SLAs) Support is to include defined SLA metrics for proactive and reactive support. Please confirm whether ECIC has predefined SLA response and resolution targets (by severity or priority level) that the bidder must meet, or whether the bidder is to propose the SLA targets for ECIC's approval.		As part of the demo and presentation. The bidders must tell us of their support structure, including defined SLAs with severity levels. ECIC has no predefined SLA response and resolution times for this solution. The bidder is to propose. There is a business impact analysis (BIA) process underway, which will inform future requirements for the ECIC, which will be discussed with the successful bidder during contracting.
	18.19. Engagement Logistics and Timeline Paragraph 11.1 (on-site presence) Please indicate the expected frequency of on-site presence at the ECIC Centurion office during Phase One implementation, to inform resourcing and pricing.		The expectation is that most of the work will be done remotely or can be done remotely. There is no defined expected frequency, as this will be discussed at the contracting stage and project kick-off. Specific occasions such as go-live and project inception may require presence on site; the bidder can propose, but what is key is for the bidder to meet timelines. The remote vs on site work will be discussed and agreed upon.
	18.20. Paragraphs 2.1, 4.3 and 23.3 (project timeline) Bid adjudication is scheduled for 9 October 2026 (Table 6), while the MVP is to be		Late October / Early November kick off. ECIC will endeavour to finalise all its internal processes as early as possible.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	"usable by 31 March 2027" and the functional evaluation assumes a three-month implementation period. Please confirm the anticipated project kick-off date following adjudication, and whether 31 March 2027 is a firm go-live date or a target, to allow accurate resource and delivery planning. We thank you in advance for your guidance and look forward to your response. Kind Regards		31 March 2027 is the latest date for MVP; in fact, complaints and leads management must be working by 31 March 2027. An earlier date is more favourable because on 1 April 2027, the ECIC must produce evidence that the system is usable for complaints and leads management and show that tracking of complaints and lead acknowledgement on the system is functional, with focus on mean-time-to-acknowledge a complaint and a lead.
19.	19.1. Reference The purpose of this Request for Proposal (RFP) is to appoint a supplier to provide and implement a modern and AI-ready Customer Relationship Management (CRM) system in a Software as a Service Model, including 36 months post-Phase One implementation support and maintenance (Phase One Minimal viable product (MVP) is anticipated to take up to 3 months). Question Can you please elaborate on when the support must start (See point 8.2 below as		Support will be required from MVP go-live and will run for 36 months. The first 3 months of support are hyper-care support. By Phase 2 the system will already be in production for certain functionality so support much be available.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	support is supposed to start in phase 2 but here seems like it starts in phase 1).		
19.2.	Reference The ECIC does not have a contact centre environment and intends to leverage technology to enable service capabilities for its clients in areas of sales leads/ enquiry submission, filing of complaints, attending to follow-ups, campaign management and optimising the use of frequently asked questions (FAQs) to disseminate information. Question Can you please confirm there is no contact centre or tooling to integrate to with this point in mind.		The ECIC does not have a contact centre. Queries are routed manually to various departments such as Compliance, Business Development, etc. Integration points are listed under Phase 2 section 8, Also further up in this document, more clarity was provided regarding integration during Phase 2.
19.3.	Reference Implementing a modern, scalable AI-ready CRM system (solution) has been identified as a key priority to be implemented and usable by March 2027 to assist the ECIC in reducing turnaround times and improving operational efficiencies.		MVP should not be complex as it focuses on at least leads and complaints management as the first deliverable. The MVP is a part of Phase 1. 31 March 2027 is a fixed date for having complaints and leads management functional, though an earlier date is desirable. The business committed to various stakeholders to have complaints and leads on the



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	Question Is this date fixed (hard deadline) or will there be room for discussion depending on the complexity of the MVP?		system by the end of our financial year, 31 March 2027. **MVP will be discussed with the successful bidder; however, leads and complaints management is a must before the rest of phase 1 is implemented
19.4.	10.4 Reference The CRM system will be the first platform implemented towards automation of the core processes, while the ECIC works on sourcing an Export Credit Agency (ECA) aligned Insurance Management System (IMS) Question Will this be something we will have to integrate with in future? And what platform is what you are considering built on?		The CRM system must integrate with the insurance platform. ECIC has not yet started the procurement process for the insurance platform; however, it is expected to be a SaaS solution. Insurance process mapping, business rules and requirements analysis processes are underway.
19.5.	Reference The Department of Trade and Industry (dtic) has since launched a leads platform, the IFW – Integrated Financing Website (https://industrialfinancing.co.za), for its entities, including the ECIC. The leads from the IFW will be shared with the ECIC via email; however, the intention is for the dtic IFW and the ECIC CRM system to integrate via API to enable real-time sharing of data.		Yes, API integration. API documentation to be provided to the successful bidder.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	Question Will the Lead Integration be done via API? Is there an API available for this?		
19.6.	10.6 Reference For Phase One MVP, it is anticipated that up to 25 internal users will utilise the system. The MVP may include portions of the requirements defined for Phase One. Question Can we please have a breakdown of the roles per user of the expected 25 users?	Section 9.1.2.1. of the RFP	We don't have further guidance except Section 9.1.2.1. Each of the Business Units listed in the RFP (Marketing, Business Development and Compliance) have one manager per Unit and the rest as staff (normal end-users). We anticipate there may be super users (plus ICT end users). Once the bidder is onboarded, we will understand the split of the 25 licenses. Of critical importance is that we will have a segregation of duties matrix defined.
19.7.	Reference License subscription usage may increase gradually as more functionality is implemented. An increase in licenses is anticipated by year two. Additionally, users must be provisioned as and when required by the ECIC, preferably after an annual review of licenses to determine if license usage should be reduced or increased. However, the flexibility to increase and reduce licenses annually is desirable. Question If the term signed for is 3 years you would only be able to decrease annually but can increase at any time.		Yes, the license count required for MVP go-live will be confirmed with the successful bidder, and only those licenses must be activated and billed at go-live, but will increase gradually. If we need to reduce licenses, this will be at anniversary date annually but increasing licenses will be as and when required. It should not take us more than a month to increase licenses.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	19.8. Reference The bidder is to load and bill only for licenses that will be utilised post go-live and gradually increase licenses as and when required. Question The licenses will be managed by the OEM and not the Vendor/OEM , is it safe to assume the vendor is expected to cover the phase 1 licensing cost or will this be covered by the ECIC?		Vendor quotes for licenses required for years 1 to 3 and bills ECIC annually.
	19.9. Reference Licenses to the production system must be usable from the date of go-live and valid for 36 months from go-live. Question This refers to point 7.1.1.1.2 and 7.1.1.1.4 above, can we please have clarity on Licensing specifics of commencement, Increasing and decreasing of licenses and when they are to be decreased as this affects the type of licensing model suggested		Development and testing licenses – the successful bidder / vendor must provide. When MVP goes live, whatever licenses of the 25 required will be made available from that date. If licenses will be decreased, this will be annually at the anniversary date, but increasing the licenses must be as and when required. The license count provided is a guide to assist with the quotation process. Specifics will be discussed with the successful bidder as input will be required from both parties
	19.10. Reference License used by the bidder during the configuration/ development of system		Correct.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	features before successful completion of user acceptance testing (UAT) and go-live must be provided by the bidder/ OEM. Phase One MVP per function will consist of a manager and staff, for whom the UAT licenses/ access must be catered to. Question Is this the case as per the question 7.1.1.1.4 above?		
	19.11. Reference Online platforms including portal/chat function and social media integration). Question Please list the social media channels as well as what needs to be achieved with the integration? (e.g. do you want to capture information or do you want to do social posting - immediate or scheduled posting, please elaborate on this requirement)		Refer to 8.3.1.1.4 – FaceBook, LinkedIn and WhatsApp. Mainly capture information and enable the filing of complaints and submission of leads from these platforms. Posting is a Phase 2 discussion. The ECIC does not have a WhatsApp account yet.
	19.12. Reference The system must notify assigned personnel of newly logged and assigned complaints. Question Must this be via email channel or is there a preference?		Email will suffice (In-app notification or the ability for the user to see new tasks when they log in as an add-on).



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	19.13. Reference "The system must automatically send the complaint outcome or resolution to the customer via the customer's preferred communication channel. The preferred channel must be configurable (e.g. email, SMS, portal). Communication content must be configurable via templates." Question Is there any other channel expected other than those listed?		These are the channels we are looking at for now.
	19.14. Reference "The system must support reporting on: Resolution turnaround times, Complainant satisfaction levels, Escalation volumes and Closure compliance rates." Question How are complaint satisfaction levels expected to be captured?		For example, an email will go to the user (complainant), and they will rate on a scale of 1 to 5 and have the means of writing a comment. This data must be captured on the system and reportable. The bidder will propose the standard levels available in the proposed system
	19.15. Reference The CRM system must provide functionality to capture, register, and submit new enquiries as leads within the platform through configurable intake channels (e.g. manual entry, web forms, email, or integrations):		• Outlook email and calendar integration. • IFW (https://industrialfinancing.co.za) portal integration of a similar DTIC portal. • Bulk SMS to be provided by the ECIC if the proposed solution does not have a built in SMS function



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	Question Please list the integrations mentioned in this point.		• Insurance Management system (yet to be implemented – integration points will be defined once the insurance to-be processes are finalised. • Social media integration – such as WhatsApp, FaceBook and LinkedIn), • MS PowerBI (Licenses to be provided by ECIC). • Digital Signature such as DocuSign. ***Read together with the response for 19.2 above for more details.
	19.16. Reference The CRM system must support the digitisation of existing manual forms by providing configurable electronic form capabilities that enable structured electronic completion, submission, and processing within the platform. Questions Are these forms to be surfaced in the system for capturing information or the digitalisation of forms that have already been captured on paper and uploaded?		We need to provide the capability for forms (such as application forms) to be completed online (web forms) without ECIC emailing forms up and down. The requirement is not for the digitalisation of forms captured already.
	19.17. Reference Bidders may indicate whether multiple campaigns can influence a single		An opportunity can arise out of multiple marketing efforts/ initiatives. For example:



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	opportunity and how attribution is handled, (e.g. primary, first-touch, last-touch). Question Can you please explain the requirement of the attribution with regards to: primary, first-touch, last-touch in a little more detail?		A prospect could interact with multiple campaigns such as Email Campaigns, Social Media and Events. If email was the first interaction the prospect had interacted with and converted to a sale from there, the email campaign as the first touch point will be recognised or credited for this prospect when looking at ROI reporting. If the event was the last interaction before the opportunity was created, the event will be linked to this prospect/opportunity as the last touch. Meaning email and social media campaigns will not be recognised for this prospect/ opportunity Primary will mean of these campaigns, one of them is designated as a primary campaign by ECIC. Effectively, we want to know out of multiple campaigns which one is responsible for the opportunity.
	19.18. Reference The system must enable the extraction and secure storage of completed application forms and supporting documentation within the CRM. Question Is the system expected to use OCR to digitise and capture information uploaded as documents in CRM? If so how many per		No, the system must store attachments associated with each ticket/ record in the system. In the main, the system must allow storage of PDFs, MS Word and Images as attachments. We want information captured through Webforms and attachments provided where required.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	month and how many different variants of documents are there (format wise).		
19.19.	Reference "The system must support digital signature functionality for customer applications and related documentation to ensure legal validity and compliance." Question Is a secure licensed third party tool integration/bolt-on acceptable?		ECIC is not prescribing a specific tool; the bidder must propose and must complete the self-evaluation (Annexure C) by selecting the most correct option. ECIC utilises DocuSign; therefore, if the solution does not have a standard digital signature functionality, the bidder will indicate this and quote for a solution if integration to DocuSign is not possible. **Read together with a response for 18.6 above for more details
19.20.	Reference "Bidders may indicate support for document management features such as versioning or document classification." Question Would this classification expected to be done by OCR or manually when uploaded?		The system should use web forms and allow for attachments. OCR is not a focus as we are not looking at digitalising forms that are already captured. Classification will be manual.
19.21.	Reference Customer, Transaction or Opportunity, submitted forms, signed/ authorised, documentation and quotes. This should include notifications and statuses in the workflow.		Quotes must come from CRM. Currently, the quotes are based on the model created in Excel.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	Question Will Quotes come from CRM or from Integration with a quoting tool? If it is an integration, what is the quoting tool being used?		
19.22.	Reference Underwriting teams must be able to access the system to access the documentation associated with projects in the pipeline and be able to update the tickets or provide status updates. Question Will these users also be licensed for CRM and are they part of the quantity mentioned in the RFP or is this above and beyond those?		They are assumed to be part of the workflow and are part of the license quantities defined.
19.23.	Reference BDU must be able to track the lead throughout the lifecycle to see the status even once the workflow is handed to STI and Underwriting Units. Question How is the lead expected to be handed to STI and Underwriting units?		Part of the workflow. From BDU, the lead will be assigned to the right Business Unit; hence, these units need access to the system. Refer to the attached business processes.
19.24.	Reference "Phase 2 will be implemented as part of the enhancement and support hours. Unused		Phase two will be based on time and material basis. The bidder will quote for X hours for the implementation based on rates quoted in the pricing



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	hours will be rolled forward until the end of the financial year. No unused hours will be rolled forward beyond 36 months." Question Please see point 2.1 above as it relates to this point around the support expectations, please clarify?		template Annexure B. If any of the quoted hours are not used during implementation, they will be rolled forward, but anything unused cannot be accessible beyond the 36 months end of contract.
19.25.	Reference Integrate with corporate email inbound/outbound communication. Question What are the corporate email tools being used currently?		Exchange Online (ECIC utilises the M365 E3 package – MS Outlook).
19.26.	Reference API integration with other systems, such as the dtic Industrial Financing Platform (https://industrialfinancing.co.za). Question Please list all integrations with other systems and if they are to be bi-directional as well as batch or near real time?		List of integrations includes at least the following: • Outlook email and calendar integration. • IFW (https://industrialfinancing.co.za) portal integration or similar DTIC portal. • Bulk SMS to be provided by the ECIC if the proposed solution does not have a built-in SMS function. • Insurance Management system (yet to be implemented – integration points will be defined once the insurance to-be processes are finalised. • Social media integration – such as WhatsApp, FaceBook and LinkedIn). • MS PowerBI (Licenses to be provided by ECIC) • Digital Signature, such as DocuSign.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
			** More integrations may be defined and quoted as part of Phase 2. ** As noted in the RFP background, ECIC's core business processes remain largely manual, and process mapping, including business rules, is still underway. Consequently, some CRM integration points have yet to be defined, making integration primarily a Phase 2 requirement. IFW integration is expected to be bi-directional, including feedback on whether leads convert to sales. Integration with the Insurance System will also be bi-directional. The final integration approach, comprising both bi-directional and one-way integrations, will be discussed with the successful bidder during Phase 2 implementation. ** Anticipating near-real-time integration of the insurance system and others
	19.27. Reference "Social Media integration to enable clients to interact with the ECIC via Social Media platforms such as WhatsApp™, Facebook™, LinkedIn™, etc. Social Media integration may be implemented as either phase one or two – the bidder will be expected to guide." Question		Essentially, the ECIC needs the complainant to be able to initiate logging a case from a Social Media platform, and the same applies for a lead. WhatsApp is not used currently, but it is one of the channels where it is expected users can file complaints and submit Leads in future, once the CRM system is available. Users should be able to submit leads from social media platforms such as Facebook, LinkedIn and WhatsApp.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	What other channels of social media are to be interacted with regards to "etc" in this point, and does this involve social media posting?		Posting will be looked at in Phase 2 in the context of being able to post events and enable registrations to be initiated from social media as a link
	19.28. Reference Email and calendar integration (calendar integration with client self-booking of time slots capability). Question Must this be native or can there be a licensed 3rd party tool/bolt-on?		The ECIC did not prescribe a native vs a third-party tool. The bidder must propose and define the solution accordingly.
	19.29. Reference Customer portal to enable customers (customers may include broker representatives or individuals) to create profiles and track their submissions (cases and leads). Question Is there a current portal? If so what platform is it built on? How many users are expected to use the portal, and what types of users as well as for what purpose (e.g. sales, complaints) and will these users need to be authenticated, or will this be public facing?		No business portal exists currently. Potential users will be for Sales and Leads purposes such as brokers and other entities. There will also be complainants. Secure portal which will require users to be authenticated. This is a Phase 2 requirement.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	19.30. Reference The system must support the digitisation of existing manual forms to enable electronic completion and processing. Question Must this be native or can there be a licensed 3rd party tool/bolt-on?		The ECIC is not prescribing this. The bidder must propose what is available on their platform and complete the scorable self-evaluation accordingly (Annexure C).
	19.31. Reference Advance campaigns and events management capability, excluding the Mobile Lead capture App and basic campaigns management functionality may be considered for deployment as phase two. Question Is there currently a Mobile Lead capture App? If so, what platform is it built on and if we are to integrate with it, in what phase would this be expected?	Annexure C (Page 7)	No, the ECIC does not have a mobile lead capture app. Essentially, what the ECIC is looking for is the capability for users at events to scan a QR code and complete a lead form. The lead should be linkable to Marketing personnel at the event and the event itself. For example, if a lead came from a user scanning a QR code at the Mining Indaba, ECIC want to know about the interest generated plus actual leads coming out of those events as part of tracking ROI.
	19.32. Reference The system must scan all attachments. Question		Security concerns – such as malware-infected files/ attachments, and only certain file types must be allowable as annexures.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	What purpose would the scanning be for? Security concerns? Or digitisation and capture of the attachments?		
19.33.	Reference The bidder/ its OEM/ hosting provider / Vendor must have an active Cyber liability cover. Question What level of Cyber liability cover is expected from the responding vendor or the OEM?	Section 9.1.1.5 of the RFP	ECIC is not prescribing this level of cover, but the OEM / hosting provider / Vendor must have a cover.
19.34.	Reference Audit logging must be enabled across the system, including user activities, tickets (leads, enquiries or complaints), login activities, status movements and communication sent out by the system. Question Is this to be activated for the whole of CRM or only specific pertinent records?	Section 9.1.1.9 of the RFP and item 84 of Annexure C	Across the system as per item 84 on page 12 of the scorable self -evaluation and 9.1.1.9 of the RFP. The bidder must select the most correct option for their solution.
19.35.	Reference End-user training (Up to 25 users to be trained for Phase One. The Training to include normal end-users, managers and/or super users in line with the segregation of duties matrix).		Training: The ECIC has a training room at its premises. ECIC adopts both in-person and online training. Therefore, the ECIC is not prescribing that all training must be in person. ECIC premises are at: 11 Byls Bridge Boulevard



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	Question Will this be in person training, if so, where? And is there a centre or place for all users to utilise for this training to be delivered in person?		Building 9, Fourth Floor Highveld Extension 73 Centurion 0157
19.36.	Reference ICT personnel training to equip ICT with the knowledge of the system and the ability to perform first-line support (Up to 5 resources to be trained). Question Will this be in person training, if so, where? And is there a centre or place for all users to utilise for this training to be delivered in person?		Training: The ECIC has a training room at its premises. ECIC adopts both in-person and online training. Therefore, the ECIC is not prescribing that all training must be in person. ECIC premises are at: 11 Byls Bridge Boulevard Building 9, Fourth Floor Highveld Extension 73 Centurion 0157
19.37.	Reference Provide training manuals (digital format). Question Are training videos (hosted by the ECIC) acceptable?		Training videos and manuals to be provided by the successful bidder and hosted by ECIC on their SharePoint site or wherever will be acceptable.
19.38.	Reference		Mostly, online will suffice. On-premises engagements will be discussed with the successful bidder; otherwise, at least once a month, the bidder's representatives and/or key resources may be required



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	The bidders' team and ECIC Business Analyst to work together to compile test cases. Question Will this be done online virtually or in person at the ECIC?		for project meetings or any other project-related activities.
19.39.	Reference "To include proactive and reactive technical support (level two support and higher) with defined SLA metrics as part of the service. The bidder is expected to indicate what proactive and reactive support will be covered by the support hours, which are not included in the subscription. The implementation plan for post-Phase One go-live will be agreed with the ECIC in advance and billed on a time-and-materials basis. Unused hours will roll over until the contract ends. " Question This point talks to the points above about type of support, when the support starts (After phase 1 or during, or from phase 2 onwards) a little unclear, please elaborate?		Support starts when MVP goes live and will continue for 36 months. The first 3 months of the year 1 support is the hyper-care support. This means support will run in parallel with the completion of Phase 1 post MVP go-live and Phase 2 implementation within the 36 months period. Considering phase 1 will comprise multiple deployments, the successful bidder and ECIC will agree on how the 3 months of hyper care support will be split to align with each production deployment.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	19.40. Reference Provision for post go-live hyper care support to ensure optimal onboarding and system adoption by ensuring technical and functional issues are resolved promptly, and system gaps are identified and remediated to avoid users defaulting to manual processes. Question How much support is to be allocated to this (e.g. 1 week? 2 weeks?)?		Hypercare support is a total of 3 months. Though quoted as to align with the first 3 months post MVP go-live. This may be split into weeks to align with the various Phase 1 production deployments. Further discussion to be held with the successful bidder
	19.41. Reference The reports must be exportable to MS Excel™ and PDF and must contain a timestamp. Question Is this expected for Phase 1 or from Phase 2 onwards?		Yes, from Phase 1, reporting will be expected and must be exportable in MS Excel and PDF. Reporting is expected from MVP to align with the functionality that will go live and will scale up as more features are deployed. From the MVP, we must be able to produce evidence to our Auditors.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	19.42. Reference Optimised for desktop and mobile device access. Question Devices will have to be of a certain specification; do you have the devices to be used specifications to share with us?		The CRM system must be accessible either from a computer (desktop/laptop) or mobile devices such as smartphones and Tablets and iPads – especially the portal or channels to leads and complaints submission. ECIC does not want a solution that will have the user interface distorted and not workable when accessed through a mobile device. Mainstream browsers (Edge and Chrome) must work.
	19.43. Reference ISAE/ SOC 2 reports will be required annually. Question Will the OEM report suffice for this?		The OEM or hosting provider, the ISAE/SOC2 reports will suffice.
	19.44. Reference Column 2 - Evaluation Criteria Description: Estimated timelines, assuming a 3-month implementation period for the Phase 1 MVP, covering Leads, Case Management, customer self-service capability, and limited Marketing capability; Question		Limited or basic Marketing refers to standard functionality which includes at least the following, but excludes advanced or overly customised Marketing functionality: Events Management – sending invitations, QR codes scanning capability for potential clients to complete the leads form when the ECIC is at events, tracking registrations & attendance, bulk emailing and newsletters.



BID NUMBER	ECIC04P-2026/27
NAME OF BID	AUTOMATION OF CRM PROCESSES INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF THREE YEARS
QUESTIONS AND ANSWERS	

No.	Question	Reference	Response
	What is meant by "limited marketing capability" and what is expected in Phase 1?		Campaigns Management – Response rate, performance dashboard, ROI and effectiveness reporting.
20.	Refer to your tender document page 6. The pricing template contains a guide on how the ECIC envisage the cost breakdown. Could you please share the pricing template.		The pricing template can be found from this link: https://www.ecic.co.za/wp-content/uploads/2026/06/ECIC04P-2026_27-Annexure-B-Pricing-template.docx Alternatively, it can be accessed from this link: https://www.etenders.gov.za/home/Download/?blobName=aa3afb61-5c27-4165-9535-3a70f56cc218.docx&downloadedFileName=ECIC04P-2026_27%20Annexure%20B%20Pricing%20template.docx