



REQUEST FOR PROPOSALS (RFP)

Acquisition, Implementation, Training, and Maintenance of a Customer Relationship Management Solution for Rwanda Finance Ltd (RFL). (LOCAL FIRMS ONLY)

Brief description of the Assignment: Rwanda Finance seeks the services of a CRM solution vendor/firm to provide comprehensive technical support under a framework contract for the selection, acquisition, customisation, implementation, ongoing adjustment and enhancement, and ongoing maintenance of a suitable CRM system. This consultancy/assignment is supported and funded by the Luxembourg Cooperation, as part of the Project RWA/024 in support to the Development of the Kigali International Finance Center, KIFC.

Type: Open Competitive Bid

Place of Assignment: Kigali, Rwanda

Duration of Assignment: 12 months (Renewable)

Deadline for Applications: 17 April 2025

Applications to be submitted to: procurement@rfl.rw

Contact number: +250783803374

I. Background/Context

Rwanda aims to become a knowledge-based and a high-income economy by 2050. To reach these goals, the country's leadership has identified several pathways, including creating and positioning Rwanda as a financial services and business hub in the region – an initiative termed “Kigali International Finance Centre” (KIFC).

To foster and promote a conducive probusiness financial environment in Rwanda, Rwanda Finance Limited was created in 2020 as an investment promotion agency, to advocate for the highest regulatory standards, industry best practices, and the most attractive products and services to suit the needs of global investors and financial institutions. Rwanda aims primarily to serve as a fund domicile and jurisdiction where local, regional, and international investors can consolidate their investments/assets.

About the Kigali International Financial Centre (KIFC)

KIFC is a national flagship initiative to transform Rwanda into a financial services and business hub. It includes Rwanda's financial ecosystem and investors looking to set up in Rwanda to invest across the African continent.

About Rwanda Finance Limited (RFL)

The Government of Rwanda established RFL as the lead agency to advance the competitiveness of the financial industry in Rwanda and facilitate increased investment and trade in the country. Over the past four years, RFL has worked with key stakeholders and partners to develop and promote KIFC through facilitating investment promotion, policy and regulatory reform advocacy, and sector upskilling.

To position itself as a more appealing international financial hub for investors, RFL must effectively manage its interactions with current and prospective investors using a robust Customer Relationship Management (CRM) system.

Our Impact

- Foster high quality job creation through workforce upskilling and investment attraction

- Increase FDI flows to Rwanda through investment attraction to grow liquidity and access to capital
- Increase national resource mobilization through widening Rwanda's tax base
- Widen and diversify Rwanda's financial sector product/service offering through niche positioning to advance and boost financial sector growth

About Project RWA/024

The RWA/024 project is a 5Year Project the Government of Rwanda has signed with the Grand Duchy of Luxembourg to *support the development of the Kigali International Finance Centre*. This project is set to contribute to Rwanda's ambition to establish and position the country as an international financial service centre through attracting the necessary domestic and international investments. This assignment forms a critical component of the RWA/024 project support that will further accelerate development and promotion of Rwanda's financial centre.

II. Purpose of the Consultancy

RFL is seeking an easy to use and adopt Customer Relationship Management (CRM) system that enhances engagement and relationships with current and potential investors. The cloud-based CRM system is intended to help RFL ensure that current investors are satisfied with their choice of jurisdiction and to increase the conversation ratio of potential investors to choose KIFC as domiciliation.

RFL is seeking the services of a CRM solution vendor/firm to provide comprehensive technical support under a framework contract for the selection, acquisition, customisation/setup, implementation, ongoing adjustment and enhancement, and ongoing maintenance of a suitable CRM system. To ensure effective adaptation of the CRM system and achievement of ultimate objective of the CRM, functionality should be implemented and adapted over time.

RFL intends to establish a framework contract with the selected CRM vendor for 12 months (renewable). This framework contract will allow for the phased implementation of CRM functionalities and ongoing support services, ensuring continuous improvement and adaptation of the system over time. Additionally, the framework contract may be revised to reflect changing activities and requirements.

III. Scope of Work

RFL hereby requests proposals from qualified CRM software vendors to provide comprehensive technical support for the selection, acquisition, customization, implementation, adjustment, and ongoing maintenance of a suitable CRM system under a framework contract. The scope of services will include the following:

Needs Assessment and System Selection

1. Analysis of RFL CRM needs and system requirements - functional (what the system should do), non-functional (system performance and usability), and technical (system compatibility, automatic updates and maintenance, and integration).
2. Evaluation and selection of an optimal CRM system that meets the end goal of RFL.

Customization and Implementation (this support will be repeated over time)

3. Customization/setup of off the shelf functionality of the CRM system to align with RFL needs and objectives.
4. Acquire the CRM license for 8 RFL staff members.
5. Integration with existing systems, especially email.
6. Comprehensive user training and ongoing support to ensure effective utilization of the CRM system.

7. Rigorous testing and quality assurance to ensure the CRM system's reliability and performance.
8. Deployment and implementation of the CRM system, especially data migration and user onboarding with intensive support during the go-live phase to address any issues that may arise.
9. Analysis of adaptation and achievement of results of the CRM system.
10. Identification and implementation of additional functionality or changes to existing functionality over time to ensure effective adaptation.

Ongoing Maintenance and Support

11. Provide ongoing technical support and, if necessary, maintenance for the CRM system.
12. Implement periodic system adjustments and updates to ensure optimal performance.
13. Monitor system performance and provide quarterly reports, including on usage.

Best Practices for Relationship Building

14. Advise on the best practices for utilizing the CRM to increase the conversion ratio of potential investors to choose KIFC as domiciliation and ensure existing investors are satisfied with their choice of jurisdiction.

IV. Deliverables/Outputs

Based on the scope of work, the CRM vendor will deliver the following to RFL:

1. Inception report and detailed work plan.
2. Comprehensive CRM system evaluation and selection report.
3. Customised CRM system configuration and alignment with RFL requirements (this may be the setup of off-the shelf functionality of the CRM system).
4. CRM licenses for 8 RFL staff members.
5. Seamless data migration and integration with existing systems.
6. Rigorous CRM system testing and quality assurance to ensure reliability and performance.
7. Successful CRM system deployment and onboarding post-implementation support.
8. Comprehensive user training program and ongoing utilisation support.
9. Technical support and if necessary, maintenance services.
10. Ongoing performance monitoring, analysis and reporting.
11. System adjustments and adding of additional functionality.
12. Best practices advisory with actionable recommendations and support to implement the recommendations.

The scope of work may be reduced during the renewal of the contract, both through removing some of the activities and reducing the scope of an activity. Additional licenses may be added at contract renewal or the amendment of the existing contract.

V. Commitment to Quality Work

The consultant shall:

- Use an evidence-based and user-centric approach to guide the development of the CRM system. This includes conducting research and analysing user requirements, ability and willingness to use the CRM, market trends, and best practices in CRM systems.
- Ensure that the development process adheres to industry standards and incorporates proven methodologies. Regularly test and validate the system to maintain high quality and timely deliverables.
- Ensure the goals of acquiring the CRM are achieved. Ensure that all requirements, features, and functionalities are well-documented and understood by the RFL team.

VI. Qualifications and Experience of the CRM Vendor/Firm

- Proven track record in CRM system implementation, customization, and integration.
- Deep knowledge of various CRM platforms.
- Expertise in analysing business processes, identifying requirements, and designing/setting up CRM solutions to address specific needs.
- Expertise in data migration, system integrations through APIs, and other technical aspects of CRM implementation.
- Proficiency in relevant programming languages, databases, and web technologies.
- Experience working with organisations in a similar industry or sector.
- Familiarity with the Rwanda and regional business environment.
- Excellent knowledge and understanding of local and regional business environment.

VII. Qualifications and Experience of Team

- At least 5 years of experience in CRM system implementation, preferably within the financial sector.
- Advanced qualifications in fields such as Business Administration, Finance, Information Systems, or other related disciplines with relevant certifications.
- Financial sector knowledge, exposure, and experience investment firms or other financial service providers.
- Experience in managing CRM implementation projects.
- Strong analytical skills to interpret customer data and generate actionable insights for business growth.
- Proven track record in improving customer satisfaction and retention through effective CRM strategies.

VIII. Reporting Obligation

The consultancy firm will report to the Chief Investment Officer of Rwanda Finance Limited and work with the delegated team who will be tasked to approve the deliverables and share the comments from stakeholders. All reports and communication related to this assignment should be in English.

IX. Application/Bidder Guidelines

Rwanda Finance invites eligible vendors/firms to provide detailed technical and financial proposals for implementing this assignment. These proposals must be prepared as separate files for independent evaluation and should showcase the firm's professional capability in performing the services requested. Such information should include;

1. A concise technical proposal with;
 - 1.1. The company profile
 - 1.2. The technical approach including the proposed work plan/schedule and methodology, and experience of the vendor/firm on similar assignments.
 - 1.3. The team including availability of appropriate qualifications and skills among the team, expected duration and profiles of the available team in carrying out this assignment, CVs recently signed of the proposed team.

2. A concise financial proposal providing showing daily fees, costs, one-time costs and ongoing costs, and expected expenses to complete the proposed activities under the scope of work defined above.
3. Administration Documents
 - 3.1. Letter of Interest addressed to the CEO; Rwanda Finance Ltd
 - 3.2. Valid Tax Clearance Certificate
 - 3.3. Copy of Certificate of Good Standing
 - 3.4. Notarized copy of Certificate of Incorporation
 - 3.5. Notarized Power of Attorney, if the person signing is different from the one on the certificate of incorporation.
 - 3.6. Notarized copy of certificate of membership to a professional body if any

X. Evaluation Process

The tender opening process is private, and firms will be assessed based on the following criteria, with all evaluations conducted by the Tender Committee (TC). The submission deadline is 17 April 2025 and all documents must be submitted separately as Administrative, Technical, and Financial documents.

1. Vendors/Firms must submit all the required administrative documents as outlined to proceed to the next steps. Failure to provide these documents will result in automatic disqualification from the bidding process, with the bidder being promptly notified.

The Administrative evaluation which is the 1st phase of evaluation will be based on the following

- a. Letter of Interest addressed to the CEO; Rwanda Finance Ltd
 - b. Valid Tax Clearance Certificate
 - c. Copy of Certificate of Good Standing
 - d. Notarized copy of Certificate of Incorporation
 - e. Notarized Power of Attorney, if the person signing is different from the one on the certificate of incorporation.
 - f. Notarized copy of certificate of membership to a professional body if any
2. Once bidders have submitted all the necessary administrative documents, they will be invited to participate in the technical evaluations which is the 2nd phase. Bidders who achieve a minimum score of 70% will proceed to the next stage of evaluations, while those who fail to meet the 70% threshold will be notified of their disqualification from the bidding process.

The technical evaluation will be based on the following

	Criteria	Points
A. Technical Approach		
	Needs assessment and CRM system selection and implementation methodology: The proposal must include a timeline of the activities to be done for the system selection, implementation, training, technical support, and upgrades.	10
	Demonstrated understanding of: <ul style="list-style-type: none"> Kigali International Financial Centre (KIFC) and the relevance, purpose, benefits, practical and strategic use of the CRM to attract international investment. 	10

	<ul style="list-style-type: none"> The objectives of the assignment as stated in the Scope of Work. 	
B. Institutional/Consultant Capacity and Past performance		
	Relevant qualifications and demonstrated experience and ability of the vendor/firm to implement a CRM system with successful experience in implementing a CRM solution over the past five years.	40
	Personnel Knowledge and Experience. Does the proposed team/consultant demonstrate the knowledge related to the CRM system development and implementation.	40
	Total	100

- The 3rd phase of evaluation is the financial evaluation, where bidders who passed the technical evaluation will be invited to participate and engage in negotiations. Final decisions will be communicated following the Tender Committee's evaluation, leading to the awarding of the contract.
- The financial evaluation will be based on;
The bidder with the Most Economically Advantageous Tender (MEAT) that does not only imply the lowest price but also the required quality, delivery and payment terms.
- The final stage involves contract negotiations and signing with the selected bidder. Before signing the contract, the successful bidder is required to provide a performance guarantee equal to 10% of the contract amount, which will be refunded upon successful completion of the assignment.

The procurement and decision-making process in Rwanda Finance Ltd shall be guided by Environmental, Social and Governance aspects of our community. The following are the fundamental principles to be adhered to for Transparency, Competition, Economy, Efficiency, Fairness, and Accountability.

XI. GENERAL TERMS AND CONDITIONS:

1. General Principles

This tender complies fully with the principles of open competition, affording equal treatment to all economic operators, and ensuring a transparent and non-discriminatory selection process. The principles include.

- the publication of the call for tenders through written media, the Internet and/or any other appropriate means of information;
- eliminates discriminatory practices or technical specifications which could hamper wide participation in the call for tenders on equal terms;
- ensures that the selection criteria are specified in the Tender Documents (TD);
- ensures that the selected tender responds to the selection conditions and criteria set out in the TD;
- ensures that no criterion which has not been published, or which is unknown to the tenderers is used in the selection of the successful tender;
- ensures that the successful tender complies with the award criteria specified in the TD;
- ensures compliance with the eligibility and ethical clauses below.

2. Eligibility for Contracts

2.1. Rules of nationality and origin

Participation in call for tenders and contracts financed from contributions made by the Government of the Grand Duchy of Luxembourg is open on equal terms to:

- Companies or firms, public bodies or semi-public bodies;
- cooperative companies and other legal persons governed by public or private law;
- any joint company or grouping of companies or firms.

2.2. Circumstances under which parties are excluded from the call for tenders procedure

Applicant or tenderer shall be excluded from participating in the call for tenders if:

- is bankrupt, insolvent, being wound up, has ceased his activities, has his affairs administered by the court or has entered into an arrangement with creditors or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- is subject to proceedings for the declaration of bankruptcy, for an order of compulsory winding up, for having his affairs administered by the court, for debt settlement or to any other proceedings of the same nature provided for in national legislation or regulations;
- has been convicted of an offence concerning his professional conduct by a judgment, which has the force of res judicata;
- has been convicted by an authoritative judgment for environmental crimes and acts contrary to environmental regulations (regardless of the country);
- has not fulfilled obligations relating to the payment of social security contributions in accordance with the legal provisions in the country in which he is established or those of the country of the contracting authority;
- has not fulfilled his obligations relating to the payment of taxes in accordance with the legal provisions of the country in which he is established or those of the country of the contracting authority;
- is guilty of serious misrepresentation in supplying the information required by the contracting authorities as a condition of participation in a call for tenders or contract;

- has failed to fulfil his contractual obligations in the performance of another contract with the contracting authority and/or another contract financed by the Financial Backer (FB) in the country of the contracting authority and/or any other country;
- is banned from participating in tenders with other FB or is excluded from public procurement in the country of the contracting authority and/or any other country;
- has been the subject of a final judgment or final administrative decision for conduct related to a criminal organisation;
- is the subject of a final judgment or a final administrative decision for the creation of an entity with the intention of evading tax, social security or other legal obligations applicable under the legal provisions of the country in which he is established or those of the country of the contracting authority;
- falls, in connection with the call for tenders or contract concerned, into one of the situations mentioned below in the section on “ethical clauses”.

2.3. Exclusion from the awarding of contracts

- Contracts will not be awarded to applicant and tenderer who, at the time of contract award procedure:
- finds himself in a conflict of interest;
- is guilty of serious misrepresentation in supplying the information required by the partner in order to participate in the tender or has failed to provide this information.

3. Ethical Clauses

- Any attempts undertaken by an applicant or a tenderer to obtain confidential information, to reach unlawful agreements with their competitors or to influence the evaluation committee, the contracting authority or the partner during the tender examination, clarification and comparison procedure must lead to the rejection of their application or tender.
- When submitting his application or tender, the applicant or the tenderer is required to declare the absence of any potential conflict of interest and the absence of any specific link with the other tenderers. Should such a situation arise during performance of the contract, the contractor must immediately inform the contracting authority.
- For the duration of the contract, the contractor and his staff must respect human rights.
- The contractor may accept no payment connected with the contract other than that provided for therein. The contractor and his staff must not exercise any activity or receive any advantage inconsistent with their obligations to the contracting authority.
- If corrupt practices of any kind are discovered at any stage of the contract award procedure, the partner is required to take all of the measures necessary to rectify this situation. For the purposes of this provision, “corrupt practices” are the offer of a bribe, gift, gratuity or commission to any person as an inducement or reward for performing or refraining from any act relating to the award of a contract or implementation of a contract already concluded with the contracting authority.
- In particular, all bids will be rejected or contracts terminated if it emerges that the award or execution of a contract has given rise to unusual commercial expenses. Such unusual commercial expenses are commissions not mentioned in the main contract or not stemming from a properly concluded contract referring to the main contract, commissions not paid in return for any actual and legitimate service, commissions remitted to a tax haven, commissions paid to a recipient who is not clearly identified or commissions paid to a company which has every appearance of being a front company.

4. Contracting Authority



The contracting authority is Rwanda Finance Limited, RFL. The completion of all RFP requirements must be in accordance with the instructions contained in this RFP which are not public. Submission to Rwanda Finance, RFL, of the technical and cost proposals will constitute an offer and indicates the consulting firm's agreement to the terms and conditions set forth in this RFP. RFL is not required to accept and/or evaluate proposals that do not conform to the instructions of this RFP and, in addition, RFL may reject all proposals and not make an award. RFL reserves the right to make an award without discussion and/or negotiation; however, RFL also reserves the right to conduct discussions and/or negotiations, which among other things may require the consulting firm to revise its proposal (technical and/or cost). By submitting an offer, consulting firms agree to comply with the general terms and conditions for an award, including Representations and Certifications of compliance. Consulting firms must provide full, accurate, and complete information in response to this solicitation. By submitting an offer, consulting firms certify that they have not and will not attempt to bribe or make any payment to RFL employees in return for preference.

Issuance of this RFP in no way obligates RFL to render an award, nor does it commit RFL to pay any costs incurred by the consulting firm to prepare and submit a proposal. RFL reserves the right to award a contract to one organization or to issue multiple awards based on the results of the evaluation.