AIRPORTS COMPANY SOUTH AFRICA

ANNEXURE C_CRM RESPONSE DOCUMENT

INSTRUCTIONS TO THE BIDDERS

Bidders must note that this annexure must be used together with Annexure D (Spreadsheet Response Sheet), as all the BRs listed below are scored in Annexure D. If the bidder's solution already has the required functionality available, they must tick the ***Functionality Available*** column. However, if the functionality is not currently available but can be developed, they must tick the ***Functionality Not Available but Can Be Developed*** column. Each option carries a certain number of points.

4.1. Customer Query Management

BR #	Requirement Description	Functionality Available	Functionality not available, but can be developed
BR 4.1.1	**Query logging and tracking.**		
	The system must have query logging and tracking capability. A query can be: ▪ Manually captured by an agent after resolving an issue or answering a question for record keeping.		

	▪ Received from various channels and/or manually captured on the system to go through a query management process.		
BR 4.1.2	**Unique Query Identifier.**		
	All queries must have a unique identifier.		
BR 4.1.3	**Multi-channel Query Logging.**		
	The system must be able to receive and log queries from various channels such as (but not limited): ▪ Email ▪ Mobile Applications ▪ SMS ▪ Website ▪ Live chat ▪ Social media (Twitter (X), Facebook, Instagram, Google Plus and WhatsApp) and Infogate (Wayfinding navigation totems).		
BR 4.1.4	**Automatic Airport Assignment.**		
	The system must automatically assign an airport name to a query, provided it was indicated as part of the query fields or mentioned as part of keywords on a query.		
BR 4.1.5	**Instant query acknowledgement.**		
	The system must instantly send a response as acknowledgement when a query is logged, in line with the business rules. This acknowledgement message should be sent via all platforms.		
BR 4.1.6	**Manual assignment and escalation.**		

	The system must have an option to manually assign an airport to a query and an agent to work on a query. System must have a 5 second rule to escalate calls that go unanswered.		
BR 4.1.7	**Query Turnaround Tracking.**		
	The business must be able to capture the turnaround times for each query type according to the applicable business rules.		
BR 4.1.8	**Query Status Updates.**		
BR 4.1.8.1	The agent must be able to update the status of a query and communicate with the customer and/or third parties directly from the system. The communication should be via all platforms.		
BR 4.1.8.2	The system must be able to receive the response to email/SMS from third parties and keep a response as part of the query history. System must send an auto respond for every step of the query management process e.g. “Thank you, your query is being attended to by XYZ		
BR 4.1.9	**Automated Resolution Notification**		
	The system must automatically send the customer a message by email or SMS when a query is resolved. The message should be sent depending on the platform the customer was utilising.		
BR 4.1.10	**Query Re-opening Process.**		
	If a customer is not satisfied with the query resolution – the system must allow automated re- opening of that query and allow an agent to		

	manually re-open a query. The business rules for re-opened queries must be captured on the system.		
BR 4.1.11	**Query Escalation Management.**		
	The unresolved query must be escalated based on escalation business rules that are captured on the system.		
BR 4.1.12	**Social Media Monitoring.**		
BR 4.1.12.1	There must be a module with a consolidated view of all ACSA Social Media pages.		
BR 4.1.12.2	The system must create and display a word cloud based on mentions that are related to ACSA.		
BR 4.1.12.3	The system must be able to identify and create a query from social media mentions and trends and trends related to ACSA.		
BR 4.1.13	**Chatbot Query Management.**		
BR 4.1.13.1	There must be a Chatbot (automated robot) that will respond to mentions on the social media platform and escalate to a live agent if the automated robot is unable to assist a customer.		
	The Chatbot must be able to chat with customers(s) on the ACSA website.		
	The chatbot must be able to first respond to frequently asked questions (FAQs) and then escalate to an agent if unable to assist a customer.		
BR 4.1.13.2	A query resolved during a chat must be logged on the system as a closed query.		

	If an agent is unable to resolve a query during a chat, they must be able to convert the chat to a query that is logged on the system to follow the query management process.		
BR 4.1.14	**Customer Profile Management.**		
BR 4.1.14.1	The system must create and store a customer profile from a received query, from a unique identifier such as email address, cell phone number, social media ID etc. The contact details on a customer profile will be used when communicating with a customer as and when required.		
BR 4.1.14.2	The queries that are in the system must be associated with a customer.		
BR 4.1.14.3	The system must allow users to generate and send messages (SMS, email, publish to the mobile application) to customers in alignment with POPIA.		
BR 4.1.15	**CRM Call Integration.**		
BR 4.1.15.1	The system must integrate with the CISCO call manager system whereby when a call comes through, it should identify or retrieve the customers' profile in the CRM system and display it using callers using the callers' cell phone number.		
BR 4.1.15.2	The customer details must be automatically populated on the form.		
BR 4.1.15.3	The CRM system must link a query logged to a call recording on the Web recall system. Users		

	must be able to access a recorded call directly from the CRM system.		

BR 4.1.16	**SMS flight updates.**		
BR 4.1.16.1	The Service Provider must provide the capability to send and receive SMS.		
BR 4.1.16.2	The system must be able to receive the SMS for flight information status queries and respond to the customer with flight information details.		
BR 4.1.16.3	The system must keep on updating the customer whenever the status of the flight changes until the last status of that particular flight is reached.		
BR 4.1.17	**Duplicate and spam detection.**		
BR 4.1.17.1	The system must be able to read the body of an email to detect whether the email received is a duplicate email or not before logging it as a query.		
BR 4.1.17.2	The system must be able to detect and flag spam emails.		
BR 4.1.18	**Performance Tracking Capabilities**		
BR 4.1.18.1	The system must allow users to capture targets for a business unit (airport).		
BR 4.1.18.2	The system must track the business unit's performance against the set targets		
BR 4.1.18.3	The system must track the agent's performance based on assigned queries		

BR 4.1.19	**Real-time Stakeholder Dashboard.**		
BR 4.1.19.1	The system must have a live dashboard that will show query breakdown per channel, query status, SLA violations, top trending query categories, agent, and airport performance, etc.		
BR 4.1.19.2	The system must have a real-time dashboard showing details of stakeholder activity.		
BR 4.1.19.3	The system must have a live dashboard that will show VIP bookings breakdown per channel, type of bookings, status, SLA violations, agent, airport performance, etc.		
BR 4.1.19.4	The live dashboard display must display the engagements that are planned and have occurred with external stakeholders: i. Display the consolidated view of ALL Stakeholder Owner's engagement progress. ii. Display the consolidated view of ALL engagements for Corporate Projects. iii. Display alignment of an engagement to the Company's KPIs. Display the outcomes achieved per engagement - aligned to the company KPI's.		
BR 4.1.20	**ACSA Data Management.**		
BR 4.1.20.1	The query and booking records must be stored in line with the ACSA Information Management Policy.		

BR 4.1.20.2	The executive, projects and master engagement plan with its corresponding feedback and action plans must be kept for a period of 5 years.		
BR 4.1.20.3	The system must enable ACSA to gain insights into customer satisfaction in order to support data-driven strategies for improving customer retention. The system should help ACSA understand how satisfied customers are-by collecting, analysing, and presenting feedback or data related to customer experiences. With these insights, ACSA can then make informed (data-driven) decisions to improve how they keep (retain) their customers.		
BR 4.1.20.4	The system must support the monitoring and analysis of new customer acquisitions, enabling ACSA to identify and utilise client references for future business development opportunities. This information will help ACSA to: ▪ Understand trends in customer acquisition, ▪ Identify satisfied or high-value new clients, ▪ And potentially use those clients as references or case studies to support future business development or marketing efforts.		
BR 4.1.21	**Archiving**		
	The query records must be stored in line with ACSA Information Management Policy.		

AIRPORTS COMPANY
SOUTH AFRICA

4.2. Key Account Management

BR #	Requirement Description	Functionality Available	Functionality Not available, but can be developed
BR 4.2.1	**Capture key account plan.**		
BR 4.2.1.1	The system must have the function to allow users to capture key account plans.		
BR 4.2.1.2	The system must allow a Business to have multiple key account plans for instances where a key account has a presence in different airports.		
BR 4.2.1.3	A key account plan must be visible to the Business, Airport RGM, and users that report to the Airport RGM and Centre of Excellence		
BR 4.2.1.4	The Business must be able to share the Key Account Plan with other airports.		
BR 4.2.1.5	The system must consolidate the Key Account Plans into a single view for Key Accounts with multiple plans.		

BR 4.2.2	Key Account Plan Areas		
BR 4.2.2.1	The CRM system must support the development of a key account plan that includes a detailed understanding of each stakeholder's business, financial performance, and strategic outlook.		
BR 4.2.2.2	The tab must consist of sections to capture: ▪ Stakeholder description, Address of the stakeholder, Industry, number of employees, financial year end, Current South African footprint. ▪ Stakeholders' Vision, Mission, Strategic Focus and Long- term goals/priorities. ▪ Stakeholder's Financial Performance to reflect the Annual Revenue generated by the stakeholder in the last five years and the Breakdown per region/airport of the stakeholder's annual revenue history for the previous five years.		
BR 4.2.2.3	The system must be able to send an alert to prompt the Business to update the stakeholder understanding quarterly. There must be an option where a user can indicate if there are no changes to stakeholder understanding.		
BR 4.2.2.4	The system must have a stakeholder matrix where the user can indicate whether a stakeholder		
BR 4.2.2.5	The system must display news related to a stakeholder and its country of origin.		

BR 4.2.3	**Industry understanding**		
	This is an understanding of the industry in which the Stakeholder operates, the competitive landscape in such industry as well as the local and global trends and events that may affect the Stakeholder and/or the industry as a whole. This is system's analysis of how global trends (e.g., Technological, regulatory, consumer behaviour, digital transformation, privacy regulations) are impacting KAM strategies in our industry (Airport).to ensure the proposed CRM isn't a generic, off-the-shelf product but is tailored to the specific challenges, opportunities, and workflows of our industry. Anticipate our business future needs based on industry trends, rather than just reacting to your current stated requirements.		
BR 4.2.3.1	▪ The proposed CRM solution must go beyond a generic, off-the-shelf product. It should be tailored to address the specific challenges, opportunities, and operational workflows unique to airport industry. ▪ The solution must demonstrate the ability to anticipate ACSA's future business needs by aligning with evolving industry trends and best practices, rather than simply responding to current stated requirements.		

BR 4.2.3.2	The tab must consist of sections to capture: ▪ The Competitive Landscape, including industry players, Current South African footprint, and Revenue for the last financial year. ▪ Local and global industry trends/events that may affect the Stakeholders and/or the industry as a whole more likely to affect the stakeholder. ▪ The system must display news on this tab that is related to or affecting the stakeholder's industry.		
BR 4.2.4	**Stakeholder decision-making unit**		
	This is an overview of the Stakeholder's current organisational structure and identify the key decision makers and contact people within the organisation as well as their key responsibilities.		
BR 4.2.4.1	The tab must consist of sections to capture: ▪ Stakeholder's decision- making units (executives, senior management etc.), including Name, Surname, Position, Key responsibilities/issues falling within their mandate, Telephone number, Email and birthday. ▪ Other relevant contact person within the stakeholder's organisation, including Name, Surname, Position,		

	▪ Key responsibilities/issues falling within his/mandate, Telephone number, and Email and Birthday.		
BR 4.2.5	**Stakeholder engagement plan**		
	This is a view of important stakeholder meetings for each KAM Team which allows for planning and preparation ahead of meetings.		
BR 4.2.5.1	The tab must consist of sections to capture: ▪ The stakeholder or Internal (ACSA) activity indicator, ▪ Engagement type, Stakeholder owner, ▪ Business Owner ▪ Attendees from the stakeholder team, ▪ Attendees from the Operations ▪ Management team, ▪ Frequency of engagement, ▪ Objectives of the engagements, ▪ Information to be sent to Stakeholder before the engagement, ▪ Financial year calendar showing when the engagement is planned with distinction between stakeholder's activities and business activities.		
BR 4.2.5.2	Stakeholder Owner must be a drop-down list linked to active directory with selected people mandated to be stakeholder owners.		
BR 4.2.5.3	There must be an indicator to specify whether an activity is an internal or external activity.		
BR 4.2.5.4	The Objectives of the Engagement Before the Engagement and Information/Data to be sent to		

	stakeholders before the engagement. It must only apply to internal activity.		
BR 4.2.6	**Value captured**		
	This is a view of the value generated from the Stakeholder and captured by ACSA (including both Financial and Non-Financial Value)		
BR 4.2.6.1	The tab must consist of sections displaying: ▪ Financial value derived by ACSA from the stakeholder for the last five years as Revenue per Financial Year, Projection/targets from current up to 5 years. ▪ Non-financial value derived by ACSA from the stakeholder, including value category and description of the non- financial value captured. ▪ The financial values should be from the Oracle Finance module with revenue breakdown based on an airport/region and as an aggregated/rolled up amount if the stakeholder is in multiple airports.		

BR 4.2.7	**Stakeholder journey**		
	This is an overview of the phases within the stakeholder journey which highlights the ACSA key role, activities and output to be delivered during each phase.		
BR 4.2.7.1	The tab must consist of sections to capture: ▪ The roadmap shows Stakeholder Journey Phases at Tender, Onboard, Move In, Operate, Re-tender, and Terminate; whether the system automatically indicates which phase of the journey the stakeholder is in. ▪ There must be a grid with phases of the road map with a column to capture the role of the Operational Management team under each phase, Activities to be completed and Outputs to be produced.		
BR 4.2.7.2	The tab must consist of sections to capture: ▪ The roadmap showing Stakeholder Journey Phases at Tender, Onboard, Move In, Operate, Re-tender, and Terminate; whether the system must automatically indicate which phase of the journey the stakeholder is in. ▪ There must be a grid with phases of the road map with a column to capture the role of the Operational Management team under each phase, Activities to be completed and Outputs to be produced.		

BR 4.2.7.3	The system must show and track activities for each journey phase, except when a stakeholder is in the tender and operate phase.		
BR 4.2.7.4	The user (Business) must be able to add timelines for each journey phase.		
BR 4.2.7.5	The system must be able to send an alert to the business when a deadline for a phase is about to be reached.		
BR 4.2.7.6	The system must be capable of sending an escalation when a deadline for a phase is missed.		
BR 4.2.7.7	The system must have an additional column to track progress and capture an activity’s output		
BR 4.2.7.8	The user must be able to add additional activities to a list of predefined activities for a phase		
BR 4.2.7.9	The system must monitor that the next phase of a journey is not initiated whilst the current stage still needs to be completed.		
BR 4.2.8	**Contract/ Lease Agreement**		
	This is an overview of the terms and conditions of the Lease Agreement/Contract		
BR 4.2.8.1	The tab must consist of sections to capture: ▪ Upload the Contract/Lease Agreement from the Property System. Capture Contract Manager, Start and End Date, Shop Number, Location and Size.		
BR 4.2.8.2	The system must auto-send alerts to the Business when a contract is about to reach an end (expiry) date.		

BR 4.2.9	**Dependence and Strategic Initiatives**		
BR 4.2.9.1	The tab must consist of sections to capture: ▪ Definitions for the types of decisions. ▪ List of decisions grid with decisions, decision rights per Operations Management team members and Additional Comments. ▪ Dependencies (areas a stakeholder depends on ACSA) include dependency, Impact on Stakeholders Operations, Responsible Person within Stakeholder's organisation, and Additional Comments. ▪ Strategic initiatives for a financial year (to address stakeholders' needs), including initiative name Strategic actions or Key opportunities, Owner, Initiative progress status, Target completion date, and additional comments. ▪ Issue tracker with Issue reported Owner within Operations Management team, proposed action to resolve the issue, Dependencies on other internal Departments, Target date to Resolve Issue (dd/mm/ yyyy), Progress status, Progress report sent to Stakeholder (Yes/No), Additional comments. ▪ The system must display the selected person's name, surname, and email		

	address on the decision-making matrix from the Active Directory.		
BR 4.2.10	**Survey capability**		
BR 4.2.10.1	Create a list of different types of surveys to select from, i.e. feedback from Stakeholder Engagement:		
BR 4.2.10.2	The user must be able to create, change, update, and delete survey questions.		
BR 4.2.10.3	The user must be able to send surveys to a selected group of stakeholders with a selected level of authority identified in the decision matrix via SMS and email.		
BR 4.2.10.4	The system must be able to receive responses to a survey.		
BR 4.2.10.5	The system must be able to analyse responses and give insights.		
BR 4.2.10.6	The user must be able to generate a report based on survey responses.		
BR 4.2.10.7	The system must allow exporting survey responses to Excel.		
BR 4.2.11	**Engagement Capability**		
	This is for communication with stakeholders on all platforms		
BR 4.2.11.1	Users must be able to create and send communication on all platforms to account stakeholders using the system.		
BR 4.2.11.2	The email or SMS must be stored as part of communication with stakeholders.		
BR 4.2.11.3	The system must show the stakeholder owner's outlook calendar.		

BR 4.2.11.4	The users must be able to send emails to an email group automatically created by the system. The email groups are based on the account category.		
BR 4.2.11.5	The users must be able to indicate or filter roles that should be added to the communication created from the system.		
BR 4.2.11.6	The system must send reminders to all invitees a day before the meeting start time and two 2 hrs. before the meeting start time.		
BR 4.2.12	**Search Functionality**		
BR 4.2.12.1	The system must have a data search function allowing users to search using various keywords.		

4.3. VIP Services

BR #	Requirement Description	Functionality Available	Functionality Not available, but can be developed
BR 4.3.1	**VIP booking logging and tracking capabilities**		
	The CRM system must provide a dedicated VIP booking, logging, and tracking capability that supports the management of VIP service engagements across multiple channels. A booking can be: ▪ Manually captured by a VIP Service Agent after receiving a call from the client requesting a booking record keeping. ▪ Received bookings from various channels and/or manually captured on the system to go through a VIP Booking management process. ▪ The system must support integration with external platforms to allow seamless data exchange and synchronization of booking information.		
BR 4.3.2	**Unique Identifier for All Bookings**		
BR 4.3.2.1	The system must assign a unique identifier to every booking captured, regardless of the channel		

	through which it is received or the method of entry (manual or automated). This identifier must be used to: ▪ Uniquely distinguish each booking record ▪ Enable accurate tracking, auditing, and reporting ▪ Support seamless integration and data exchange with external platforms		
BR 4.3.2.2	The system must be able to receive and log queries from various channels such as (not limited): Email, Mobile Applications, SMS, Website, Live Chat, via VIP universal contact centre.		
BR 4.3.3	**Booking Information Capture and Airport Assignment**		
BR 4.3.3.1	The system must allow VIP Service Agents and other authorized users to capture comprehensive booking information. The data captured should include, but not be limited to, the following fields: ▪ **Type of Stakeholder** *(dropdown list)* ▪ **Full Name** ▪ **Arrival or Departure** *(selection)* ▪ **Date of Travel** ▪ **Flight Number** ▪ **Airline** ▪ **Flight Type** *(Domestic or International)* ▪ **Luggage Assistance Required** *(Yes/No)* ▪ **Refreshments Required** *(Yes/No)*		

	▪ **Meeting Point** *(e.g., Kerbside, Parking – dropdown list)* ▪ **Number of Passengers/Delegates**		
BR 4.3.3.2	The system must automatically assign an airport name to a booking.		
BR 4.3.4	**Instant Booking Acknowledgement**		
BR 4.3.4.1	The system must instantly send a response as acknowledgement when a booking is logged, in line with the business rules. This acknowledgement message should be sent via all platforms.		
BR 4.3.5	**Booking request notification**		
BR 4.3.5.1	The system must generate and send a workflow notification to the person requesting a booking to accept or reject the booking.		
BR 4.3.6	**Manual booking assignment**		
BR 4.3.6.1	The system must provide functionality to manually assign or reassign the following to a booking: ▪ The **airport** associated with the booking ▪ The **VIP service agent** responsible for managing the booking		
BR 4.3.6.2	The functionality must include: ▪ An interface to initially assign the appropriate airport and VIP agent during or after booking creation. ▪ The ability to reassign bookings to the correct airport if initially logged incorrectly.		

	▪ The ability to change or reassign VIP agents as needed, based on availability or responsibility.		
BR 4.3.7	**Capture Turnaround Times for Bookings**		
BR 4.3.7.1	The system must enable the business to capture and record turnaround times for each booking type, in accordance with defined business rules.		
BR 4.3.8	**Status update & communication**		
BR 4.3.8.1	The VIP agent must be able to update the status of a booking and communicate with the person who made the booking, and/or third parties directly from the system. The communication should be via all platforms.		
BR 4.3.9	**Response tracking & notification**		
BR 4.3.9.1	The system must be able to receive responses to email/SMS from third parties and keep a response as part of the booking history.		
BR 4.3.9.2	The system must automatically send the person that made the booking a message by email or SMS when a booking has been finalised. The message should be sent depending on the platform the person requesting a booking was utilising.		

BR 4.3.10	**Booking re-opening process**		
BR 4.3.10.1	If a person that made a booking is not satisfied with the turnaround time of the booking/response received relating to the booking, the system must allow automated re-opening of that booking and allow a VIP Agent to manually re-open a booking. The business rules for re-opening a booking must be captured on the system.		
BR 4.3.11	**Booking Escalation**		
BR 4.3.11.1	The unresolved/finalised bookings must be escalated based on escalation business rules that are captured on the system.		
BR 4.3.12	**Booking escalation process**		
BR 4.3.12.1	If an agent is unable to finalize a booking, they must be able to convert the booking to an escalation to management. The Agent must follow the SOP for the system management escalation process.		
BR 4.3.13	**Mobile App Booking Capability**		
BR 4.3.13.1	There must be a capability to book VIP service on the mobile App.		
BR 4.3.13.2	When the booking is received via the mobile App it must automatically generate a response with a unique identifier and link to the CRM system. All the VIP Services bookings must be handled by the VIP Agents via the CRM system.		

BR 4.3.14	**Customer Profile**		
BR 4.3.14.1	The system must integrate with Active Directory to retrieve, create and store a VIP profile from a received booking, e.g., from a unique identifier such as email address, cell phone number, mobile app, profile ID etc. The contact details of a booking requester will be used when communicating with the person who made a booking as and when required. The bookings that are in the system must be associated with a booking requester.		
BR 4.3.14.2	The system must allow users to generate and send messages (SMS, email, publish to the mobile application) to the booking requester in alignment with POPIA.		
BR 4.3.15	**Integration with CISCO call manager system (Contact Centre)**		
BR 4.3.15.1	The system must integrate with the Cisco Call Manager system to enable real-time caller identification and profile retrieval. When a call is received: ▪ The system must match the caller's cellphone number to existing records in the CRM. ▪ Upon a successful match, the system must automatically retrieve and display the requester's profile, including relevant booking history and contact details. ▪ This process must occur instantly upon the incoming call, ensuring that VIP Service		

	Agents or contact centre staff have immediate access to the stakeholder's information.		
BR 4.3.15.2	The booking requester's details must be automatically populated on the form.		
BR 4.3.15.3	The CRM system must link a booking logged to a call recording on the Web recall system. Users must be able to access a recorded call directly from the CRM system.		
BR 4.3.16	**Spam detection.**		
BR 4.3.16.1	The system must be able to read the body of an email to detect whether the email received is a duplicate email or not before logging into it as a booking.		
BR 4.3.16.2	The system must be able to detect and flag spam emails.		
BR 4.3.17	**Survey Management**		
BR 4.3.17.1	The system must allow users to create, update, and delete survey questions.		
BR 4.3.17.2	Users must be able to send/publish a survey. The person requesting a booking consent is required.		
BR 4.3.17.3	The system must be able to receive survey responses from the person requesting a booking.		
BR 4.3.17.4	The system must automatically send an automated satisfaction survey to a person requesting a booking whenever a booking is closed. The survey must be sent via a channel (email or SMS) used to communicate with a person requesting a booking. The system must		

	automatically send an automated satisfaction survey to a person requesting a booking whenever a booking is closed. The survey must be sent via a channel (email or SMS) used to communicate with a person requesting a booking.		
BR 4.3.17.5	The system must analyse the survey responses and generate insights (built-in intelligence) based on responses.		
BR 4.3.18	**SMS for booking information requests.**		
BR 4.3.18.1	The Service Provider must provide the capability to send and receive SMS.		
BR 4.3.18.2	The system must be able to receive the SMS for booking status and respond to the booking requester with booking details.		
BR 4.3.18.3	The system must keep on updating the booking requester whenever the status of the booking changes until the last status of that booking is reached.		
BR 4.3.19	**Setting performance targets**		
BR 4.3.19.1	The system must allow users to capture targets for a business unit (airport).		
BR 4.3.19.2	The system must track the business unit's performance against the set targets.		
BR 4.3.19.3	The system must track the agent's performance based on assigned queries.		

BR 4.3.20	**ACSA Website Booking Capability**		
BR 4.3.20.1	There must be a capability to book VIP service on the ACSA Website through integration		
BR 4.3.20.2	When the booking is received via the ACSA website it must automatically generate a response with a unique identifier and link to the CRM system. All the VIP Services bookings must be handled by the VIP Agents via the CRM system.		
BR 4.3.21	**Business Intelligence**		
	This section comprises all BI requirements across all business units to avoid duplication		
BR 4.3.21.1	The system must align with the current BI outputs on Power BI.		
BR 4.3.21.2	The system must give ACSA insight into customer satisfaction for better customer retention.		
BR 4.3.21.3	BI will also allow ACSA to monitor new customer acquisitions to gain client references in future.		
BR 4.3.21.4	The system must provide integrated Business Intelligence (BI) capabilities to accurately monitor, measure, and report on key customer service performance indicators. The system should allow ACSA to: ▪ Monitor- continuously observe customer service activities (e.g., response times, number of queries resolved, wait times). ▪ Measure - collect and quantify performance data (e.g., customer		

	satisfaction scores, service level compliance). ▪ Report- generate reports or dashboards that show trends, insights, and KPIs (Key Performance Indicators) for decision-making.		
BR 4.3.21.5	The system must provide business intelligence (BI) features to accurately monitor and measure VIP service factors. The system needs to provide insights into booking the requester's satisfaction for better customer retention.		
BR 4.3.21.6	The system must be compatible with ACSA's existing Power BI environment and align with current BI output standards and data models. The new system should work seamlessly with ACSA's current Power BI setup. This means it must: ▪ Be able to send data to Power BI or allow Power BI to connect to it. ▪ Use data structures (data models) and formats that match what ACSA already uses in their Power BI reports and dashboards. ▪ Follow ACSA's standards for how business intelligence reports and outputs are generated.		

4.4. Stakeholder Relations Management

BR #	Requirement Description	Functionality Available	Functionality not available, but can be developed
BR 4.4.1	**External stakeholder profiling**		
BR 4.4.1.1	The Stakeholder Relations Coordinators must be able to capture, delete and/or edit external stakeholder profiles. Other system users must be able to view only.		
BR 4.4.1.2	The external stakeholder should consist of stakeholder name, surname, position held, contact details, organisation, organisation address, classification, category, email address, phone, number, mobile number, personal assistant name, personal assistant contact number, stakeholder matrix (level of influence/ significant impact), priority level.		
BR 4.4.1.3	Data collection should be aligned with the Protection of Personal Information Act (POPIA).		
BR 4.4.1.4	The system must be able to suggest names of external stakeholders while the user is typing based on stakeholder names stored on the database.		

BR 4.4.2	**Stakeholder Contact Groups**		
BR 4.4.2.1	The system must have user contact groups and automatically add the external stakeholder to email, SMS and/or mail (letters) group(s).		MPANY CA
BR 4.4.2.2	The group for SMS must consist of the stakeholder’s name, mobile number, and the company represented		
BR 4.4.2.3	The email and mail (letters) group must consist of the stakeholder’s name, email address, company representative, and position held.		
BR 4.4.3	**View a profile.**		
BR 4.4.3.1	The system must have a screen showing a list of all stakeholders that have been created.		
BR 4.4.3.2	The user must be able to view a stakeholder profile. The details of the stakeholder and the picture associated with the profile must be displayed when viewing a profile.		
BR 4.4.4	**Capture a Corporate Project (Engagements)**		
BR 4.4.4.1	The system must have the capability to allow users to capture a project by adding these minimum fields: project name, description, project duration, project owner, and stakeholders.		
BR 4.4.4.2	The users must be able to update the fields captured for a Project.		
BR 4.4.4.3	The system must generate a unique identifier for the engagement plan and each engagement objective on the plan.		

BR 4.4.5	**Engagement plan**		
BR 4.4.5.1	The coordinator must be able to capture the executive(s) engagement plans. The engagement plan can be for a stakeholder owner and/or for a project.		CA
BR 4.4.5.2	The coordinator must capture a master / consolidated plan for the organisation with targets for engaging stakeholders.		
BR 4.4.6	**Executive engagement plan for a Stakeholder Owner (Executive**)		
BR 4.4.6.1	The system must allow a coordinator to capture a new engagement plan for an executive at the beginning of each financial year. The executive engagement plan must be valid for a financial year.		
BR 4.4.6.2	The engagement plan should consist of the following minimum fields: external stakeholder name, ACSA/stakeholder issues, Group KPI engagement approach, divisional strategic objectives, relationship status, frequency, planned date, priority level and stakeholder commercial value.		
BR 4.4.6.3	The system must generate and send a workflow notification to a stakeholder owner (executive) to accept or reject the engagement plan.		

BR 4.4.7	**Engagement Plan for a Corporate Project**		
BR 4.4.7.1	The engagement plan must consist of external stakeholders(s), stakeholder needs and expectations, engagement approach, strategic divisional objective, planned engagement date, the status of the planned engagement, and stakeholder owner.		
BR 4.4.7.2	The engagement plan must be valid for the duration of a project.		
BR 4.4.7.3	The system must allow a stakeholder owner who is added to an approved project's engagement plan to have access to capture feedback for an engagement.		
BR 4.4.7.4	The system must generate and send a workflow notification to a project owner to accept or reject a plan.		
BR 4.4.7.5	The system must notify the stakeholder relations coordinator who created a plan when rejected or approved.		
R 4.4.8	**Engagement objectives**		
R 4.4.8.1	The Executive Assistant and/or Executive must be able to capture a planned engagement into the executive's engagement plan. A planned engagement objective should have the following status: ▪ Pending after being added: ▪ Scheduled when there is a scheduled engagement.		

	▪ Pending feedback when feedback is not captured. ▪ Completed when feedback is added.		
BR 4.4.9	**Display stakeholder owners**		
BR 4.4.9.1	The system must be able to flag outstanding engagements at the end of each quarter in line with commitments in the uploaded engagement plan.		
BR 4.4.9.2	The system must have the capability to upload files which can then auto- upload issues against stakeholders already on the system. The system must monitor and track the executive, project specific, and master plans performance; and display the following: ▪ Actual against target total number of engagements per week, month, quarter, and year. ▪ Actual against projected stakeholder value adds. ▪ Average status of external stakeholder relationships. ▪ Stakeholder level of influence (based on the value of the stakeholder profile). ▪ Graphical comparison of planned engagement VS completed engagement. ▪ Key themes of engagements are done to ensure the business is engaging in line with divisional objectives in the plan.		

BR 4.4.10	**Display stakeholder owners**		
BR 4.4.10.1	The system must be able to flag outstanding engagements at the end of each quarter in line with commitments in the uploaded engagement plan.		
BR 4.4.10.2	The system must have the capability to upload files which can then auto- upload issues against stakeholders already on the system. The system must monitor and track the executive, project specific, and master plans performance; and display the following: ▪ Actual against target total number of engagements per week, month, quarter, and year. ▪ Actual against projected stakeholder value adds. ▪ Average status of external stakeholder relationships. ▪ Stakeholder level of influence (based on the value of the stakeholder profile). ▪ Graphical comparison of planned engagement VS completed engagement. ▪ Key themes of engagements done to ensure the business is engaging in line with divisional objectives in the plan.		

BR 4.4.11	**Plan updates**		
BR 4.4.11.1	The stakeholder relations coordinators must be able to update a rejected and/or approved master plan and re-send it to Stakeholder Owner or Project Owner for approval.		
BR 4.4.11.2	The system must notify the stakeholder owner (executive) of changes made to the approved plan.		
BR 4.4.12	**Schedule an engagement that is linked to Plan.**		
BR 4.4.12.1	The user must be able to schedule an engagement linked to the engagement objective on the plan. The minimum details to be captured are as follows: a) To field defaulting to external stakeholders. b) Meeting organizer(s) defaulting to stakeholder owners: ▪ Engagement method. ▪ Location ▪ Start time and end time ▪ Body/ content of email		
BR 4.4.12.2	The system must have the option to allow users to select and add the other Stakeholder		

	Owner(s) that have pending engagements with a particular stakeholder. All Stakeholder Owners should be reflected as meeting organisers.		
BR 4.4.12.3	The system must link the scheduling function to the Outlook calendar to reflect the diary of Stakeholder Owner(s) and/or internal stakeholders.		
BR 4.4.12.4	The users must be able to send an invitation for scheduled engagement.		
BR 4.4.12.5	The system must automatically change the status of the engagement objective to "scheduled" for all Stakeholder Owner(s) captured as meeting organisers.		
BR 4.4.12.6	The system must be able to receive responses for an engagement invitation from external stakeholders and Stakeholder Owner(s).		
BR 4.4.13	**Invitation response notification**		
	The system must notify the Stakeholder Owner(s) and stakeholder relations coordinators when there is a response to the invitation from an external stakeholder.		
BR 4.4.14	**Engage the external stakeholders**		
BR 4.4.14.1	The users must be able to engage with external stakeholders via Microsoft Teams and/or email directly from the system.		
BR 4.4.14.2	The system must keep an audit trail of engagements conducted directly from the		

	system. The following minimum information should be stored on the record of each engagement: ▪ Stakeholder contacted. ▪ Name of the person who contacted the stakeholder ▪ Timestamp ▪ Audio recording		
BR 4.4.14.3	The Stakeholder Owner must have the option to record an engagement session.		
BR 4.4.15	**Capture feedback after an engagement**		
BR 4.4.15.1	The system must have a form for capturing engagement feedback. Each feedback form must be linked to the engagement Objective, stakeholder needs and expectations.		
BR 4.4.15.2	The system must activate a feedback form when the start time for the engagement commences.		
BR 4.4.15.3	The system must notify the Stakeholder Owner(s), and meet organisers, with a link to capture engagement feedback after the engagement end time; and change the status of an engagement Objective to pending feedback.		
BR 4.4.15.4	The stakeholder owner must have the option to mark the captured feedback as public or private. There must be an option to add people with access to private feedback.		

BR 4.4.15.5	The system must automatically change the status of an engagement objective to complete once the feedback is submitted.		
BR 4.4.16	**Action items**		
BR 4.4.16.1	The Stakeholder Owner(s) must be able to capture action items that resulted from the engagement. The action must be linked to an engagement objective that had occurred.		
BR 4.4.16.2	The action item should have an Action owner defaulting as Stakeholder Owner name, Action name, Impact (low, medium, high), Details, Responsible Person, Status (open, resolved, closed). The person responsible must be selected from the Active Directory.		
BR 4.4.16.3	The system must apply relevant SLAs based on the impact assigned to an action.		
BR 4.4.16.4	The system must automatically send an email notification with a logged action summary to the Responsible Person and the stakeholder relations coordinator.		
BR 4.4.16.5	The system must allow the Responsible Person access to capture comments on an action item and change the action status to resolved.		
BR 4.4.16.6	The system must automatically notify the Stakeholder Owner and stakeholder relations		

	coordinator when an action is changed to resolved.		
BR 4.4.16.7	The system must only allow the stakeholder relations coordinator and stakeholder owner to close an action.		
BR 4.4.16.8	The system must automatically send an escalation email to the Stakeholder Owner and Group Manager for Stakeholder Relations when an action SLA is violated.		
BR 4.4.17	**Bulk emails and letters**		
BR 4.4.17.1	The system must allow users to generate letters and send emails.		
BR 4.4.17.2	The user must be able to manually create a mailing group to send an email or letter(s).		
BR 4.4.17.3	The user must be able to add the group automatically created by the system as the recipient for email or mail.		
BR 4.4.17.4	The system must have the option to allow users to remove an email address from the automatically created emailing group when adding a group as an email recipient.		
BR 4.4.17.5	The system must automatically populate the stakeholder’s name and surname on the email greeting.		
BR 4.4.17.6	The system must send an email from a generic email address.		

BR 4.4.17.7	The system must allow users to create letter templates with letterheads for each airport that can be used when generating letters.		
BR 4.4.17.8	The user must be able to select a specific template to use when capturing the letter's content		
BR 4.4.17.9	The user must be able to remove the stakeholders who are not supposed to receive a letter from the automatically created mailing group		
BR 4.4.17.10	The system must auto-populate the letter with a stakeholder's company address and have the salutation as the stakeholder's name and surname.		
BR 4.4.18	**System Reporting**		
BR 4.4.18.1	The system must generate the engagement plan progress report for ALL Stakeholder Owners.		
BR 4.4.18.2	The system must generate the engagement plan progress report for ALL Corporate Projects.		
BR 4.4.18.3	The system must generate the report for action items with their corresponding status for the period.		
BR 4.4.18.4	The users must be able to generate reports on an ad hoc basis and export them to Excel, Word, and PowerPoint		

4.5. Tenant Relationship Management

BR #	Requirement Description	Functionality Available	Functionality Not available, but can be developed
BR 4.5.1	**Tenant Opportunity and Lead Management**		
BR 4.5.1.1	The system shall allow for the capture of potential tenant leads, including the identification of the lead source type (e.g., tender, SCM process, direct inquiry).		
BR 4.5.1.2	The system must support opportunity tracking for each Expression of Interest (EOI), including status updates (e.g., received, shortlisted, rejected).		
BR 4.5.1.3	The system must log and track all commercial negotiation activities, including meetings, calls, and emails.		
BR 4.5.1.4	The system shall support task assignment and follow-ups related to negotiations and internal approvals.		
BR 4.5.1.5	The system must provide workflow tracking for regulatory consultations, including milestone management and document storage.		

BR 4.5.1.6	The system shall allow users to recommend available space to prospective tenants and associate proposals with specific locations or units.		
BR 4.5.2	*The contracting and onboarding of tenants will be done via the SCM Digitalisation System (Only for information purposes)*		
BR 4.5.3	**Operations Stage**		
BR 4.5.3.1	The system must be connected to external-facing channels (e.g. Portals, Forms, Email parsing, API integrations) through which customers can log queries/ issues. This ensures that tenants can log queries without accessing the CRM directly, and internal teams still get full visibility and control.		
BR 4.5.3.2	The system must allow users to track and resolve daily operational issues and incidents reported by tenants. Such as: (Facilities & Maintenance Issues, Billing & Lease-Related Queries, Tenant Experience / Relationship etc)		
BR 4.5.3.3	The system must log ongoing communications with tenants, including emails, phone calls, and meeting notes.		
BR 4.5.3.4	The system shall support the recording and resolution of billing and invoicing queries linked to the finance system.		
BR 4.5.3.5	The system must track tenant performance reviews, store associated documents, and record follow-up actions.		

BR 4.5.3.6	The system shall provide a centralized dashboard summarizing tenant information, operational history, and current issues.		
BR 4.5.4	**Exiting Stage**		
BR 4.5.4.1	The system must allow initiation and tracking of lease termination requests, including notice dates and approval workflows.		
BR 4.5.4.2	The system shall support a configurable exit checklist covering: ▪ Premise take-back inspection ▪ Airport access clearance ▪ Final billing ▪ Key return and premise vacating		

Traffic Development Unit

BR #	Requirement Description	Functionality Available	Functionality Not available, but can be developed
BR 4.5.5	**Prospecting**		
	The system must enable users to identify and segment target airlines based on key criteria such as fleet size, aircraft types, route networks, and strategic alignment.		

BR 4.5.6	**Data Analysis**		
	The system must allow users to import and analyse external market data to support the development of preliminary traffic and financial forecasts for proposed airline routes.		
BR 4.5.7	**Engagement:**		
	The system must allow users to log all communications with airlines, schedule calls and meetings, and assign follow-up tasks to relevant team members to support effective engagement tracking and collaboration		
BR 4.5.8	**Proposal Development:**		
	The system must enable users to develop airline proposals by leveraging stored templates, historical data, and relevant insights within the CRM to build compelling, data-driven business cases.		
R 4.5.9	**Stakeholder Alignment:**		
	The system must enable users to identify, track, and engage local stakeholders within the CRM to facilitate alignment and secure necessary support, such as marketing funds or partnership commitments		

BR 4.5.10	**Pipeline Management:**		
	The system must provide pipeline management capabilities to track each opportunity from initial contact through all stages, including proposal, negotiation, and final outcome (e.g., successful launch or declined opportunity).		
BR 4.5.11	**Account Management:**		
	The system must support account management by transitioning successful opportunities into active client accounts, enabling ongoing engagement, issue tracking, and performance monitoring to ensure airline satisfaction and route sustainability.		
BR 4.5.12	**Reporting**		
BR 4.5.12.1	The system must generate reports on the volume and source of tenant inquiries (e.g., website, referrals, walk-ins, campaigns).		
BR 4.5.12.2	The system must report on lead conversion rates and average time-to-conversion from inquiry to signed contract.		
BR 4.5.12.3	The system shall provide insights into quotation requests, bid success rates, and follow-up effectiveness.		

BR 4.5.12.4	The system must allow filtering of leads by source, lifecycle stage, property type, or assigned representative.		
BR 4.5.12.5	The system must report on the number of active, pending, and dropped contracts during the contracting stage.		
BR 4.5.12.6	The system shall track average time to contract closure and reasons for delays or abandonment.		
BR 4.5.12.7	The system must provide real-time visibility into deposits received, outstanding payments, and total contract values.		
BR 4.5.12.8	The system must track onboarding progress and report on task completion for each tenant.		
BR 4.5.12.9	The system shall identify onboarding bottlenecks and average time to complete the onboarding process.		
BR 4.5.12.11	The system must report on onboarding satisfaction, if feedback is collected.		
BR 4.5.12.12	The system must report on open and resolved service requests or support tickets, categorized by type and resolution time.		
BR 4.5.12.13	The system shall track tenant engagement metrics, such as communication frequency, support interactions, and service usage.		

BR 4.5.12.14	The system shall report on occupancy rates, unit availability, and contract renewal forecasts.		
BR 4.5.12.15	The system must report on tenant exit reasons, notice periods, and completion of offboarding tasks (e.g., final inspections, key returns).		
BR 4.5.12.16	The system shall generate reports from exit surveys, including satisfaction scores and common feedback themes.		
BR 4.5.12.17	The system must flag tenants for re-engagement opportunities based on historical data and satisfaction indicators.		
BR 4.5.12.18	The system must provide dashboards offering a holistic view of tenant lifecycle stages and overall tenant health.		
BR 4.5.12.19	The system shall report on tenant retention rates and the average duration of tenant contracts.		
BR 4.5.12.20	The system must identify high-performing properties or units based on occupancy, satisfaction, or revenue.		
BR 4.5.12.21	The system shall allow export of reports in formats such as Excel and PDF and support the creation of custom reports.		
BR 4.5.12.22	The system must enforce role-based access to reports, ensuring appropriate visibility for users in		

	different departments (e.g., leasing, finance, operations).		

4.6. Training Academy

.BR #	Requirement Description	Functionality Available	Functionality not available, but can be developed
BR 4.6.1	**Lead Capture**		
	The system must capture and manage leads from multiple channels, including: ▪ Website forms ▪ Email ▪ Walk-ins ▪ Social media (LinkedIn and Facebook) ▪ Word of mouth ▪ Phone calls ▪ Conferences and exhibitions		
BR 4.6.2	**Course Discovery and Inquiry**		
	The system must allow learners/customers to: ▪ View available courses		

	▪ View real-time training space (seat availability) before making a booking ▪ Send queries for additional information		
BR 4.6.3	**Course Booking**		
	The system must allow customers to book training courses online via ACSA Website or self-service portal		
BR 4.6.4	**Online Payment Integration**		
	The system shall support secure online payment functionality for training bookings. **Note:** Payments will not be processed directly through the CRM. The system must be integrated with the ERP to track payment status (paid, pending, failed).		
BR 4.6.5	**Booking Confirmation**		
	The system must automatically generate and send space confirmation notifications to customers once payment is received.		
BR 4.6.6	**Pre-Sales Activity Tracking**		
	The system shall log all pre-sales activities and customer interactions for tracking and follow-up		

BR 4.6.7	**Unresolved Query Escalation**		
	The system must automatically escalate any unresolved query that has not been addressed within 72 working hours, excluding weekends and public holidays		
BR 4.6.8	**After-Hours Notification**		
	If a user submits a query or request on a weekend or public holiday, the system must automatically generate a message notifying the user of the Aviation Academy’s standard working hours and informing them that the request will be processed during business hours.		
BR 4.6.9	**Contracting**		
BR 4.6.9.1	The system must allow customers to complete and submit a digital Training Request Form (TRF) only where seats are still available.		
BR 4.6.9.2	The system must allow customers to request details of next dates for courses, where the seats of the selected courses are all full.		
BR 4.6.9.3	The system shall automatically route completed TRFs to the Finance department for billing		
BR 4.6.9.4	The system must enable Finance to generate and send invoices directly from the CRM to customers, with copies to internal stakeholders (e.g. AAA).		

BR 4.6.9.5	The system shall allow customers to upload proof of payment and nomination forms through the CRM or via email integration.		
BR 4.6.9.6	The system must trigger and send confirmation emails to customers including course details, dates, venue directions, times, and contact information.		
BR 4.6.10	**Onboarding**		
BR 4.6.10.1	The system shall send automated confirmation emails with access details, login credentials, and course schedules for online courses - once registration and payment are complete.		
BR 4.6.10.2	The system shall allow pre-population of attendance registers based on confirmed participants and their ID numbers.		
BR 4.6.10.3	The system must generate printable or digital attendance registers for on-site verification.		
BR 4.6.10.4	The system shall support the scanning and uploading of signed attendance registers into the participant's CRM record.		
BR 4.6.10.5	The system must maintain a secure, searchable database of all attendees with relevant onboarding documentation.		
BR 4.6.10.6	The system must send automated reminders before the start of an online course (e.g., one week and one day before).		

BR 4.6.11	**Training**		
BR 4.6.11.1	The system shall track learner progress, course completion, and assessment results from the LMS backend into the CRM for unified reporting.		
BR 4.6.11.2	The system shall enable chatbots or email integration for responding to learner queries and providing support.		
BR 4.6.11.3	The system must provide personalized notifications such as course announcements, material updates, or schedule, venue changes.		
BR 4.6.12	**Post-Training**		
BR 4.6.12.1	The system must auto-generate certificates upon successful course completion and email them to learners or provide access via a self-service portal.		
BR 4.6.12.2	The system shall allow automated sending of certificates via secure links once training is completed.		
BR 4.6.12.3	The system must allow customers to access and download their certificates from a self-service portal.		
BR 4.6.12.4	The system shall enable the Aviation Academy to send marketing communications to customers.		
BR 4.6.12.5	The system must allow customers to opt in or out of marketing communications in compliance with data privacy regulations (e.g. POPIA, GDPR).		

BR 4.6.12.6	The system must support sending of automated reminders for upcoming certificate renewals based on training dates and validity periods.		
BR 4.6.12.7	The system shall track certificate expiry dates and automatically send renewal reminders when due.		
BR 4.6.13	**Post-Course Engagement & Marketing**		
BR 4.6.13.1	The system must report on online and onsite (in-class) course enrolment numbers, attendance, completion rates, and learner satisfaction scores.		
BR 4.6.13.2	The system shall provide insight into learner demographics, regions, and buying behaviour to inform course development and marketing strategy.		
BR 4.6.13.3	The system must report on revenue from all delivered training and customer lifetime value.		
BR 4.6.14	**Integration**		
BR 4.6.14.1	The system shall integrate with Teams platform to schedule sessions, track attendance, and log participation automatically into the CRM.		
BR 4.6.14.2	The system must integrate with existing or future platforms (e.g., Moodle, Oracle Learn etc.) to sync student enrolment data.		
BR 4.6.14.3	The system must integrate with Oracle for payment purposes		

BR 4.6.15	**Reporting**		
BR 4.6.15.1	The system shall generate reports on the number of individuals trained across all courses and venues.		
BR 4.6.15.2	The system must be able to generate reports segmented by geographic regions (e.g., Southern Africa, Eastern Africa, etc.).		
BR 4.6.15.3	The system must report on revenue generated from training sales, including per course, region, and time period.		
BR 4.6.15.4	The system shall identify and report on frequent customers based on training history and repeat engagements.		
BR 4.6.15.5	The system must provide dashboards and exportable data for analysis and strategic planning.		

5. Data Migration:

BR #	Requirement Description	Functionality Available	Functionality not available, but can be developed
BR 5.1	**Transfer of Historical Data from Existing Systems**		
	a) There is an expectation to migrate historical customer-related data from existing systems into the new CRM platform. This includes, but not limited to, data currently stored in SharePoint via the ACSA DECK platform.		

	▪ All source systems and SharePoint repositories are accessible for data extraction. ▪ Data quality checks and transformation rules will be defined prior to migration.		
BR 5.2	**Data Migration Plan**		
	a) A dedicated data migration plan must be developed and approved early in the project to confirm: ▪ Final datasets to be migrated. ▪ Exclusions based on retention policy. ▪ Required validation and reconciliation steps post-migration.		