

Customer Relationship Management Solution

Scope of Work

Glossary

Acronym	Description
ACSA	Airports Company South Africa
AD	Active Directory
ARR/DEP	Arrival/Departure
ASQ	Airport Service Quality
COE	Center of Excellence
CRM	Customer Relationship Management
HR	Human Resources
IT	Information Technology
KAP	Key Account Plan
KAM	Key Account Manager
VIP	Very Important Person
RFP	Request for Proposal
SLA	Service Level Agreement
SOW	Scope of Work
SO	Stakeholder Owner
XML	eXtensible Markup Language
W3C	World Wide Web consortium

Table 1: Glossary

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1. Introduction

1.1. Background

Airports Company South Africa (ACSA) is focused on delivering high-quality customer service across all nine of its airports and improving its customer satisfaction index. To support this goal, ACSA plans to implement a Customer Relationship Management (CRM) solution that will enable efficient, standardized customer engagement and service delivery across the business. The CRM solution will cater to several departments and customer segments, including Corporate Services (Brand & Marketing) in terms of managing strategic stakeholders, non-aeronautical customers such as car rental companies, retail shops, airlines, ground handling companies, and hotels from a tenant lifecycle management standpoint (from pre-sale/pre-contracting, operation until exiting), as well as Aeronautical customers. Additionally, it will support Client & Passenger Services in managing strategic customers like VIPs whose relationships need to be managed differently, as well as key accounts, enabling the organization to build, nurture, and strategically manage relationships with its most valuable customers. The solution will also cater to the Training Academy by streamlining and automating the full training lifecycle, including customer engagement, bookings, onboarding, training delivery, certification, and post-training reporting. It should also provide the ability to send marketing information to customers, enabling the Training Academy to promote future training opportunities and stay connected with its client base.

By adopting a unified CRM system, ACSA aims to streamline interactions, improve responsiveness, and enhance the overall customer experience.

1.2. Purpose

Airports Company South Africa SOC Ltd (ACSA) hereby invite Bidders to submit proposals for a Customer Relationship Management (CRM) solution. The Service Provider will be expected to provide licences, implement the business requirements, support, and maintain the solution for a period of five (5) years.

1.3. Objective

The objective of undertaking the CRM project is to achieve or deliver the following:

- Implement a centralized solution that will support ACSA's customer-centric strategy across all nine airports.
- Enhance customer satisfaction by enabling consistent, efficient, and standardized customer engagement across the business.
- Provide a unified platform to manage interactions with diverse customer segments, including:
 - Client & Passenger Services
 - Corporate Services (Brand & Marketing)
 - Non-Aeronautical customers (e.g. car rental companies, retail tenants, hotels, ground handling companies, and cargo customers)
 - Training Academy and Conference Centre clients
 - Aeronautical customers
- Streamline and improve responsiveness in customer service through automation, tracking, and real-time visibility into customer interactions.
- Enable cross-departmental collaboration by breaking down data silos and promoting shared access to customer information.
- Support ACSA's goal of increasing its customer satisfaction index by leveraging actionable customer insights.
- Provide a scalable and adaptable solution that can evolve with the business's needs and customer expectations.
- Improve operational efficiency through workflow automation, case management, and integrated communication channels.
- Establish a single source of truth for customer data to improve reporting, forecasting, and decision-making.
- Support compliance with data privacy and customer service standards through secure and auditable CRM processes.

2. RFP Scope:

The scope of the project entails the following:

- Software license procurement
- Software installation (and hardware if solution will be hosted on-prem)
- Configuration, customization, and testing.
- Integration
- Testing
- Project Management
- User training.
- Commissioning
- Support & Maintenance when the solution is operational.

3. Solution Conceptual Model:

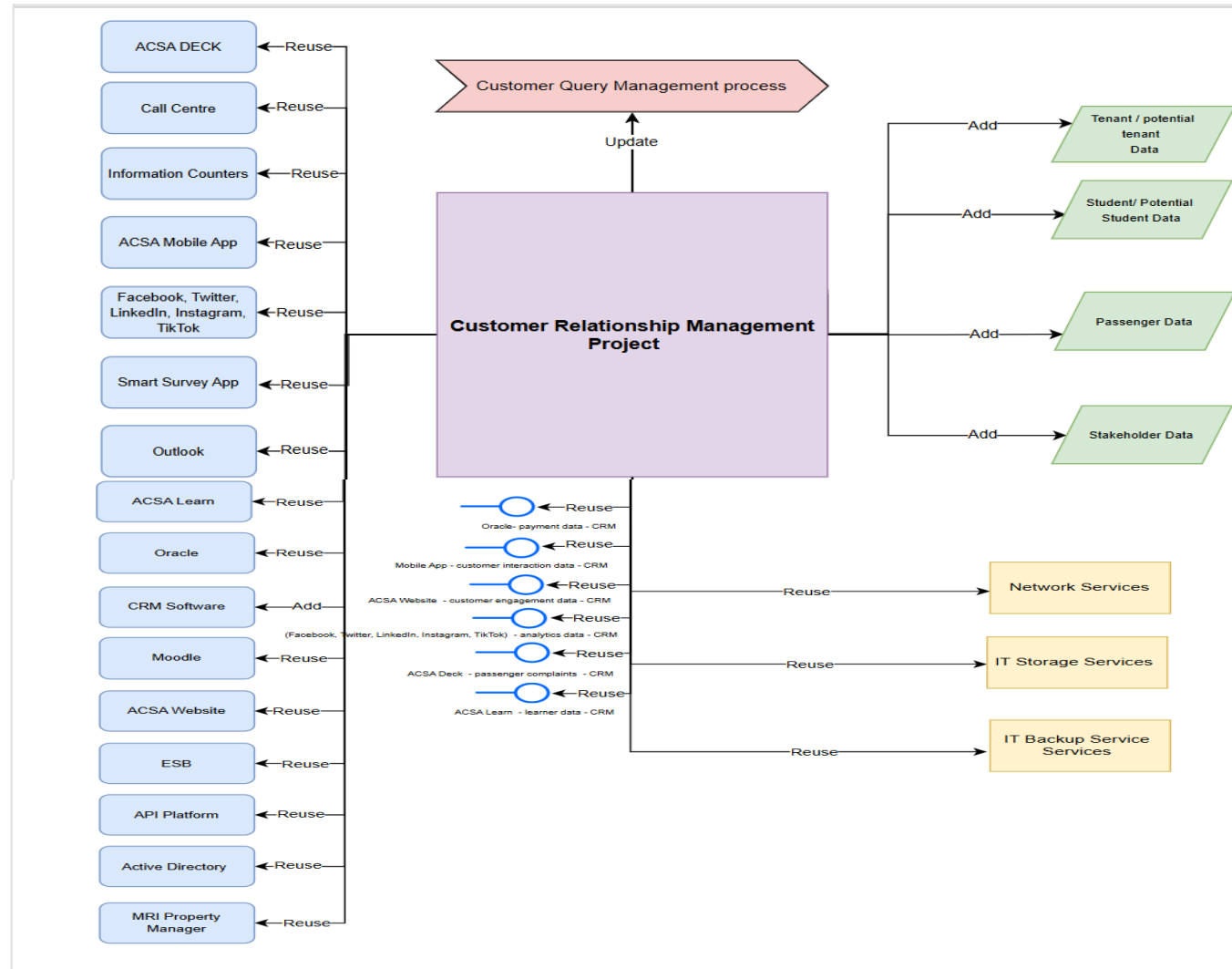


Figure 1: Customer Relationship Management Project- Conceptual Model

3.1. Conceptual Model Narrative:

- API Platform (recommended if solution will be cloud-based), or ESB platform (recommended if solution will be hosted on premise).
- The CRM solution will reuse ACSA Learn system for seamless flow of training-related data, improving visibility, coordination, and customer engagement throughout the training lifecycle.
- The CRM solution will reuse Oracle system for seamless flow of customer, billing, and payment data, enabling end-to-end visibility and streamlined operations across departments.
- The CRM solution will reuse Mobile App for seamless, personalized, and responsive experience for customers by enabling real-time data exchange between backend systems and the mobile interface.
- ACSA DECK (SharePoint):
 - Used to store customer response data.
 - This data will be migrated to the CRM for centralised access and reporting.
- Call Centre:
 - Call interactions are managed via Cisco.
 - Call data is manually logged using a trending sheet for analysis.
- Social media:
 - Direct engagement through platforms including Facebook, Twitter, LinkedIn, Instagram, and TikTok.
- Stakeholder feedback / Feedback:
 - Smart Surveys app → Data transposed to Excel → Modeled → Published to Power BI
 - Feedback collected via the Smart Surveys app.
 - The data is exported to Excel, modelled, and then visualised using Power BI.
- Announcements:
 - Announcement details are captured manually using a template.
 - Public announcements are made via the PA system.

- The CRM solution, if hosted on premises, will reuse ACSA network, storage and IT Backup services
- Customer query management process will be automated
- The solution will require tenant data to manage tenant relationships throughout the cycle
- Potential tenant data to support early engagement, nurtures leads and helps convert interest into actual tenants.
- Student data to enable the academy to deliver a more efficient, personalized, and responsive training experience across the entire learner journey.
- Potential student data to support early engagement, nurtures leads and helps convert interest into actual bookings.
- Potential client data is vital for turning interest into confirmed business and building long-term client relationships.
- Passenger data to enhance passenger experience, personalize services, and support operational decision-making.
- Stakeholder data for streamlining communication, enhance collaboration, and support strategic relationship management.
- Customer Data Management: Centralized repository for capturing, storing, and managing all customer-related data across departments.
- Sales and Marketing Automation: Tools to streamline lead generation, campaign management, and customer engagement activities.
- Service and Support Management: Functionality to track customer inquiries, complaints, and service requests to enhance customer satisfaction.
- Reporting and Analytics: Dashboards and reports to provide insights into customer behavior, sales performance, and service effectiveness.
- Integration Capabilities: Seamless connection with existing systems such as ERP, mobile apps, websites, and third-party platforms to ensure data consistency and process automation.
- Security and Compliance: Measures to safeguard customer data and ensure compliance with relevant data protection regulations.
- User Access and Role Management: Controlled access to data and functionalities based on user roles and responsibilities within the organization.

4. Functional Requirements:

4.1. Network Planning Service Standards and Performance: Customer Query Management

Operations Management (NPSSP) aims to automate the current manual Query Management process by transitioning to a CRM solution. Passenger Services Agents handle queries through platforms such as social media, information desks, call centres, the mobile app, and the ACSA DECK. The requirements are based on these platforms.

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.		

4.2. Network Planning Service Standards and Performance: Key Account Management

(Operational Stakeholders)- Operations Management (NPSSP) requires the conversion of the current manual Key Account Planning (KAP) tool into an automated system. This enhancement aims to streamline processes, improve efficiency, and ensure consistent and accessible account planning across the business.

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. Network Planning Service Standards and Performance: VIP Services (To manage VIP customers)

Operations Management (NPSSP) requires the conversion of the manual VIP Service booking tool they are currently utilising into an automated system. The following requirements are based on the VIP tool that the VIP Service Agent uses. ACSA VIP Lounge is responsible for the facilitation of high-profile passengers and group delegates. The link will be shared with VIP PA's or other booking requesters. Approximately 400 ACSA VIP Stakeholders comprising of Government Ministers & Deputies, Premiers. Executive Mayors, ACSA Chairperson of ACSA Board of Directors, ACSA CEO & Executives etc,

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 (<i>dropdown list</i>) ▪ Full Name ▪ Arrival or Departure (<i>selection</i>) ▪ Date of Travel ▪ Flight Number ▪ Airline		

	▪ Flight Type (<i>Domestic or International</i>) ▪ Luggage Assistance Required (Yes/No) ▪ Refreshments Required (Yes/No) ▪ Meeting Point (<i>e.g., Kerbside, Parking – dropdown list</i>) ▪ 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. Corporate Services: Stakeholder Relations Management:

Stakeholder relations management performs two core functions which are the management of engagement plans and Corporate projects.

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: Property Terminal, Industrial & Diverse; Retail & Car Rentals

Effective Tenant Relationship Management requires a comprehensive solution that supports the end-to-end journey of a tenant, from initial engagement during the pre-sale or pre-contracting phase through to onboarding, day-to-day operations, and eventual offboarding or exit. This document outlines the functional and process requirements for a system capable of managing every stage of the tenant lifecycle, ensuring seamless transitions between phases, centralized data management, proactive communication, and consistent tenant experience. The goal is to enable operational efficiency, improve tenant satisfaction, and support long-term relationship management through automation, integration, and visibility across all touchpoints

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	<i>The contracting and onboarding of tenants will be done via the SCM Digitalisation System (Only for information purposes)</i>		
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 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 Requirements

This document outlines the functional requirements for a CRM solution to support and enhance the operations of the ACSA Aviation Academy. The objective is to streamline current processes, introduce greater automation, and improve the management of customer interactions across the full training life cycle. The CRM system must support the Aviation Academy's strategic goals by delivering improved efficiency, transparency, and reporting capabilities. The requirements detailed below are structured along the key stages of the customer journey, from pre-sales engagement to post-training analysis and reporting. Each section highlights specific capabilities the CRM must enable to meet both current and future operational needs.

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.		

BR 5.3	Alignment with Data Retention Policy		
	The scope, type, and volume of historical data to be migrated must be determined in alignment with ACSA's Data Retention Policy.		

6. Non-Functional Requirements:

NFR #	Requirement Description
NFR 6.1	Hosting
	The Service Provider to advise on the best environment on which to host the solution.
NFR 6.2	Redundancy
	Backup or failover mechanisms need to be in place to ensure high availability, reliability, and fault tolerance.
NFR 6.3	Scalability
	The system must cater for 5% to 10% growth per year for additional users.
NFR 6.4	Solution availability
	The system shall be operational 24/7/365, with a target availability rate of 99.9%
NFR 6.5	Fault Tolerance
	The system shall be able to operate under partial system failures (e.g., one or more failed components) without losing overall functionality.
NFR 6.6	Recoverability
	The system shall feature robust disaster recovery capabilities to quickly restore operations after a system failure, with a recovery time objective (RTO) of 1-4 hours and recovery point objectives (RPO) is 1- 4 hours.
NFR 6.7	Usability
	▪ The system's User Interface (UI) shall be intuitive, user-friendly, and be able to accommodate users with varying levels of technical skills. ▪ The solution must be web-based.

NFR 6.8	Maintainability
	Modularity: The system shall be designed in a modular fashion, allowing for easy updates, maintenance, and replacement of individual components without affecting the overall system.
NFR 6.9	Documentation
	Comprehensive, clear, and up-to-date built and detailed architecture documentation shall be provided to support system maintenance and upgrades.
NFR 6.10	Supportability
	The vendor support shall include 24/7 technical support with specified maximum response times for different types of issues.
NFR 6.11	Environmental
	▪ Sustainability: Design and operation shall minimize environmental impact, promote energy efficiency and using environmentally friendly materials wherever possible. ▪ Durability: The system components shall be robust enough to withstand the physical conditions of the airport environment, including variations in temperature, humidity, and handling.
NFR 6.12	Encryption
	The system shall encrypt all sensitive data at rest and in transit.
NFR 6.13	Multi-Platform Availability
	The system should be compatible with a variety of mobile device platforms, ensuring it works seamlessly across different operating systems, such as iOS and Android. This includes optimizing the user interface and performance to deliver a consistent and efficient experience regardless of the device or platform.
NFR 6.14	Physical locations
	The system be available in all nine (9) ACSA sites and Corporate Office.
NFR 6.15	User Volumes
	▪ Operations Management (Customer query management) ▪ Read-only (185 users). ▪ Full functionality (15 users).
NFR 6.16	Operations Management (Key Account Management)
	▪ Read-only (10 users).

	▪ Full functionality (40 users).
NFR 6.17	Corporate Services (Stakeholder Relations Management)
	▪ Read and update (72 users). ▪ Full functional rights (8 users).
NFR 6.18	Platform performance (Speed & Latency)
	▪ The system must respond in less than 5 seconds. The Service Provider is to provide the estimated bandwidth requirements. ▪ The system must respond immediately when attaching a document(s). ▪ The system must handle 1000 minimum queries during peak times.
NFR 6.19	Reliability & Availability (Days/Hours)
	▪ The solution must be available 24/7 with a minimum availability of 99.8%. Past performance reports and/or statistics must be provided to this effect. ▪ The solution must cater for high availability backups and disaster recovery. ▪ The solution must be able to backup daily and have offsite storage for backup storage. ▪ The solution must be able to recover deleted data from backups. The recovery point objective (RPO) must be at most one (1) day.
NFR 6.20	Security
	▪ The Service Provider must provide ACSA with their best security practices or controls detailing how they will secure the proposed solution. ▪ The solution must ensure that data is transmitted in a non-readable format (encrypted / Ciphertext) and has strong key management. The solution must provide encryption capabilities for stored data to ensure that data at rest is protected. For example, Transport Layer Security (TLS) must be version 1.3 or higher. ▪ The Service Provider must ensure that Server-level security features are in place for the solution. They must provide information related to the following: patching, anti-virus, vulnerability scanning, intrusion detection with real-time alerts etc. ▪ The Service Provider must ensure that Data Centre security features are in place. They must provide information related to the following: Physical security measures, which include an integrated security management solution such as around-the-clock on-site security personnel, video surveillance, and monitoring—as well as industry-leading policies and practices. ▪ The solution must also detect anomalies in functionality, user accessibility, traffic flows, and tampering.

	▪ Authentication- the solution must uniquely identify users and authenticate them. Administrator accounts must be segregated from normal user accounts. ▪ Authorization- the solution must enable users and/or role-based permissions to be configured to control what solution features and data users can access. ▪ Audit- the solution must keep an audit trail of all activities performed in the solution (includes but is not limited to the following: who created, updated, and deleted (must be authorised by super users) the record, with time and date stamp. ▪ Assurance- the solution must maintain data integrity and quality. The solution must be a single source of truth regarding data and calculations. ▪ Availability- the solution must be secured to prevent denial of service to ACSA users. It must also provide threat protection. ▪ Asset Protection – the solution must protect ACSA data from being viewed by unauthorised personnel. ▪ The solution must limit access to suspicious visitors and monitor traffic spikes to prevent overloads like DDoS attacks etc. ▪ The Bidder must issue ACSA with a certificate of compliance or external audit reports detailing how they comply with data management and/or Information Security Management, e.g., ISO 27001 or SOC.
NFR 6.21	User Access Rights
	The solution must enable users and/or role-based permissions to be configured to control what system features and data users can access.

NFR 6.22	Operations Management (Customer query management)
	▪ Contact Centre and Info counters(face-to-face) agents: create view. ▪ Query administrator: create, view, edit. ▪ Supervisor: view and edit. ▪ Centre of Excellence: View and edit. ▪ Airport General Manager for Operations Management: View and edit.
NFR 6.23	Operations Management (Key Account Management)
	▪ Business Managers: Create, view, edit. ▪ Group executives: View only. ▪ Chief Executive Officer: View only.

	▪ Chief Operations Officer: View only. ▪ Centre of excellence: View and edit. ▪ Airport General Manager: View only. ▪ General Manager: View only. ▪ Airport operations manager: View only. ▪ Airport General Manager for Operations Management: View and edit.
NFR 6.24	Corporate Services (Stakeholder Relations Management)
	▪ External Stakeholder Relations Coordinators at Corporate: View & edit all airports and corporate executives' masterplans, schedules, feedback, actions, and reports. ▪ External Stakeholder Relations Coordinators at Airport: View & edit all airport-specific masterplan, schedules, feedback, actions, and reports. Must not have access to ACSA Corporate platform. ▪ Group Executives: View all & edit own page view all other executives and airport stakeholder owner engagement plans, feedback, and actions. ▪ Airport stakeholder owner: cannot view group executive pages, however, can only view other airport stakeholder owner's pages.

NFR 6.25	Integrity
	The system must serve as a single source of truth for all relevant data and calculations, ensuring consistency, accuracy, and reliability across all processes and reporting.
NFR 6.26	Privacy and data ownership
	▪ Comply with ACSA's Information Security policies and standards, including POPI Act. The ACSA's ▪ Information Security policies are to be provided before the contract agreement. ▪ All data remains the property of ACSA.
NFR 6.27	Audit Trail
	▪ There must be an audit trail of who created, updated, and deleted (must be authorised by super users) the record, with time and date stamp.

NFR 6.28	Service Access
	Query management, Key account management and Employee query management functions must be accessible via laptop, desktop, and tablet.
NFR 6.29	Accessibility Requirements
	The stakeholder management function must be accessible on multiple device types, including laptops, desktops, mobile phones, and tablets, to ensure usability and flexibility for all users.
NFR 6.30	Operational
	Business hours are between 8 am and 7 pm. However, system availability must be 24/7.
NFR 6.31	Business Continuity
	- The system must have an alternative way to ensure business continuity in cases where there is an unfortunate downtime event. - Must be able to perform business functions during downtime, and the system must be synchronized with activities that took place when the system was down. - Disaster recovery instance of the solution must be at a separate physical location, at least 25 km from the production instance. The sites should have different utility feeds, e.g., power, water, network, etc. - IT Service continuity strategy for the solution must align with the recovery time and point objectives identified by the Airports Company South Africa SOC Ltd. The IT Service continuity strategy will be provided to the Service Provider before the contract agreement) - Periodically (i.e., at least once annually), through testing, assure the Airports Company South Africa SOC Ltd regarding the effectiveness and adequacy of the IT service continuity strategy. - There must be an updated business continuity plan that demonstrates your company's continuity arrangements for operational disruptions.
NFR 6.32	Local Support
	The solution's first-line support must be based locally (international support can form part of the 2nd and 3rd line support).
NFR 6.33	Look and Feel
	The solution must be white labelled to align with ACSA's Corporate identity and branding.

NFR 6.34	Data Centre
	▪ The solution must be hosted in a Tier level 3 or higher data center Tier. ▪ Regulatory and compliance certificates must be provided, e.g., ISO27001.
NFR 6.35	Technology Roadmap
	▪ The Service Provider to provide a roadmap of their CRM solution
NFR 6.36	Development Environment
	▪ The solution must be able to migrate customizations created in a development environment to a production environment.

7. Integration Requirements:

The CRM system will be expected to integrate with, connect to, exchange data with, and/or migrate data from the following systems. Integration with existing on-premises systems (service provider to inform ACSA about their APIs, extensions, and plugins) etc.

BR 7.1	Integration
BR 7.1.1	CRM <-> Web Recall System (for accessing call record).
	The CRM system must be capable of linking a logged customer query to its corresponding call recording stored in the Web Recall System. Users must be able to access and playback the associated recorded call directly from within the CRM system, without needing to navigate to the Web Recall System separately.

BR 7.1.2	CRM <-> CISCO call manager system
	The CRM system must integrate with Cisco Call Manager to identify incoming caller cellphone numbers and automatically retrieve the corresponding customer profile within the CRM.
BR 7.1.3	CRM <-> social media (Facebook, Twitter, LinkedIn, Instagram, and TikTok)
	The CRM system must integrate with ACSA's social media pages to consolidate all interactions into a single platform for unified monitoring, engagement, and response management.
BR 7.1.4	CRM <-> Active Directory (users' profiles).
	The CRM system must integrate with Active Directory to authenticate users and synchronize user profiles, roles, and permissions.
BR 7.1.5	CRM <-> Outlook
	The CRM with Outlook ensures seamless tracking of emails and calendar events, improving user productivity, collaboration, and customer engagement through centralized communication.
BR 7.1.6	CRM <-> FIDS
	The CRM system must integrate with the Flight Information Display System (FIDS) to access real-time flight data for accurate passenger query handling and service coordination.
BR 7.1.7	CRM <-> Oracle Finance
	The CRM system must integrate with Oracle to enable seamless data exchange related to customer accounts, billing, and service history, ensuring a unified view of customer information.
BR 7.1.8	CRM <-> SharePoint
	The CRM system must integrate with SharePoint to enable seamless access to website content and efficient storage, retrieval, and management of attachments and related documents.
BR 7.1.9	CRM <-> ACSA Mobile App
	The system must integrate into ACSA Mobile App to enable real-time access to customer data and services on the go, improves communication and responsiveness, and enhances the overall passenger experience through personalized and timely interactions.
BR 7.1.10	CRM <-> ACSA ESB

	▪ The CRM solution must interface with the IBM ESB using a message-based architecture to ensure reliable, scalable, and asynchronous data exchange between systems. ▪ The data format passed by the interface must use industry standards, e.g., W3C standards such as XML. ▪ The CRM solution must support a two-way data sync, i.e., between the CRM solution and back-end on-premises systems.
BR 7.1.11	CRM <-> API Platform
	The CRM solution must be able to integrate with the API Platform for seamless, real-time communication and data exchange between the CRM and other systems, enhancing automation, improving data accuracy, and enabling a unified customer view across platforms.
BR 7.1.12	CRM <- > MRI Property Manager
	The CRM system must integrate with MRI Property Central to enable efficient logging, tracking, and resolution of customer queries related to property and lease management, ensuring timely and accurate responses.
BR 7.1.13	CRM <-> Moodle
	The CRM system must integrate with Moodle in order to sync student enrolment data.

8. Project Documentation and Artifacts

8.1	Documentation
	The Service Provider must produce the following project-related documentation during the project implementation: ▪ Project Management deliverables as per ACSA Methodology.

- Architectural design as per best practice Architecture Principles.
- Functional Specification.
- Technical Specification.
- Quality Assurance Specific Documentation (Test Strategy, Test Plan, Test Cases, Defect Reports and Test Completion Reports for all conducted tests)
- Operational Manuals
- Training Manuals.

9. Testing

To ensure that the system is thoroughly tested, the solution will be subjected to the following testing types:

TT #	Testing Type
TT 9.1	Unit Testing
	The Service Provider will be expected to thoroughly test individual components (or units) of the software in isolation to ensure they work as expected.
TT 9.2	Integration Testing
	The Service Provider will be expected to thoroughly test if different modules or services used by the system work well together
TT 9.3	System Testing
	The Service Provider will be expected to thoroughly validate the complete and integrated system to evaluate its compliance with the specified requirements.
TT 9.4	Functional Testing
	To verify that the application behaves as expected based on functional requirements.
TT 9.5	Performance Testing
	To assess the system's responsiveness, speed, scalability, and stability under load.
TT 9.6	Penetration and Vulnerability Testing

	To identify and assess security weaknesses in the system.
TT 9.7	User Acceptance Testing
TT 9.4.1	Planning
	The UAT team will be expected to define scope, objectives, and criteria for user acceptance testing.
TT 9.7.2	Test Case Development
	The UAT team will be expected to create detailed test scenarios based on business requirements
TT 9.7.3	User Preparation
	The UAT team will be expected to prepare end-users on UAT procedures and tools
TT 9.7.4	Test Case Execution:
	System users will be expected to thoroughly execute test cases, logging issues and feedback.
TT 9.7.5	Issue Resolution
	The Service Provider will be expected to track and resolve defects identified during testing.
TT 9.7.6	Sign-Off
	The UAT team will be expected to obtain formal approval from stakeholders once criteria are met.

10. Training:

A well-designed user training program is essential for the successful adoption of the Compliance Management System. By focusing on clear communication, role-specific training, hands-on practice, and ongoing support, users will be well-prepared to leverage the system to its fullest potential. Below are training requirements that must be delivered by the Service Provider:

TT #	Training Type
TR 10.1	User Training
	The Service Provider will be expected to train end-users on basic system functions, such as logging in, using biometric

	readers, and navigating key features.
TR 10.2	Administrator Training
	The Service Provider will be expected to train system admins on configuration, user management, reporting, and troubleshooting.

11. Change Management:

To ensure smooth adoption of the Compliance Management System, system users will need to be taken through the people's change management by ACSA's Digital Change Manager. The following structured approach will be used:

CM #	Change Management Requirement
CM 11.1	Stakeholder Engagement
	Identify and involve key stakeholders early to ensure buy-in and support.
CM 11.2	Communication Plan
	Develop clear, timely messaging to inform users of upcoming changes, benefits, and timelines.

CM 11.3	Training & Support
	Provide relevant training and support to ease the transition and build user confidence.
CM 11.4	Change Champions
	Appoint change agents within teams to promote adoption and provide peer support.
CM 11.5	Feedback Mechanisms:
	Establish channels for user feedback to address concerns and improve adoption.

CM 11.6	Readiness Assessment
	Monitor organizational readiness and adjust strategies as needed.

12. Project Management Requirements:

The following are the responsibilities that will be expected from the Service Provider 's project manager:

PMR	Project Management Requirement
PM 12.1	Project Management Approach
	a) Utilize project management methodologies, knowledge, skills, tools, and techniques consistent with leading internationally recognized and accepted project management practices such as those contained in the Guide to the Project Management Body of Knowledge (PMBOK) or Prince 2 or any other accredited project management certification. b) Perform project management review and oversight, attend scheduled project meetings, ensure key milestones are achieved by Service Provider, ensure all ACSA project governance processes are in place and are being achieved throughout the project

PM 12.2	Define Project Team
	The project manager must be able to define a group of people responsible for executing the tasks and producing deliverables outlined in the project plan and schedule
PMR 12.3	Resource Planning
	The project manager must be able to determine what resources are required to deliver projects and then allocating and scheduling the work based on team capacity
PMR 12.4	Define Project Plan

	a) Provide project definition and plan, identify major critical milestones, ensure delivery within budget and project deliverables aligned and approved by the ACSA Project Manager. b) Provide, maintain, and update detailed integrated project planning, identify critical path dependencies. c) Facilitate project plan approval, critical milestones, budget forecast, and project deliverables. d) Schedule and facilitate weekly project meetings to review detailed project plan and critical path dependencies, risks and issues. e) Manage an integrated baselined project schedule, which will include all ACSA and third-party tasks, and all known dependencies. f) Project schedule to include all project milestones, including billing milestones. g) Project schedule to be baselined within the first four weeks of project kick off. Any changes to the baseline to be presented to project board for review and approval.
PMR 12.5	Manage project progress and execution
	a) The project manager must be able to track project activities and tasks in MSP to ensure that the project does not go off course or hit any delays or setbacks along the way. b) The project manager must ensure project management activities are carried out and ensure updated communication to project stakeholders is done. c) The project manager must report on project progress, budget, risk, issues. d) The project manager reviews and escalate any issues risk etc. for action to higher governance authorities as required

PMR 12.6	Budget Management
	The project manager must be able to manage the total projected costs needed to complete a project over a defined period of time
PMR 12.7	Asset Management
	The project manager must ensure all assets are asset tagged and documented prior to installation according to ACSA Asset Management standards

PMR 12.8	Stakeholder Management
	The project manager must be able to do stakeholder identification, analysis, and management to ensure alignment, secures support, identifies risks, enhances decision-making, fosters communication, facilitates adaptation, and contributes to the organization's reputation.
PMR 12.9	Project Governance
	a) The project manager must be able to enforce project governance to ensure adherence to the procedures and policies that determine how projects are managed and overseen. b) Draft project charter with input from ACSA for sign off by all stakeholders. c) Complete all required project artifacts and ensure they are approved through required forums and stakeholders – which may include, but is not limited to solution design, test plans, integration plans, migration plans, change controls, communication plans, decommission plan, asset management forms. d) All project documentation to be saved in ACSA central document repository. e) All documentation to be completed on ACSA templates, using ACSA naming convention. f) Minute all meetings within 48 hours of the meeting, list all actions from the minutes in the RAID log. g) Include end to end asset management requirements aligned to ACSA policy and procedure in scope of deliverables – this includes asset tagging of ALL assets, completing asset capitalization form and submitting such forms with invoices to enable payment.

PMR 12.10	Project reporting
	The project manager must provide weekly project reports, and monthly Steerco reports to the project board in ACSA format.
PMR 12.11	Project Close Out
	The project manager must ensure that all activities required to close out the project are carried out to ensure that the project is properly closed out and seamlessly handed over to operation without incomplete activities.

13. Solution Guidelines:

SG #	Solution Guidelines
SG 13.1	The system must be on the ACSA network
SG 13.2	There shall be a single application to support a given business capability, i.e., the solution must not re-implement a capability already available in the portfolio, unless it is replacing the current one.
SG 13.3	The solution must be as secure as business requirements dictate.
SG 13.4	The solution must meet legal and conformance requirements, including those for privacy.
SG 13.5	The solution must provide adequate performance and responsiveness.
SG 13.6	The solution shall be able to scale, without redevelopment, for anticipated increase in volumes for the next 5 years.
SG 13.7	The solution must be reliable and easily recoverable.
SG 13.8	The solution shall validate input data and maintain the integrity of any data added, updated or exported.
SG 13.9	The solution must provide APIs which allow services to be accessed via an interface conforming to industry standards adopted by ACSA, e.g., Web Service (REST, SOAP).
SG 13.10	The solution shall avoid “hard coding” of value, i.e., any variables which are likely to change must be externalized to the database or parameter/rule files.
SG 13.11	The solution shall trap errors and report them in a meaningful and persistent way.
SG 13.12	The solution end user interfaces must be intuitive, and standards based to facilitate ease of adoption and reliable usage as well as reduced training requirements.
SG 13.13	The solution must be fit for purpose.
SG 13.14	The solution must be delivered in accordance with the specification and service level agreement.
SG 13.15	The solution must adhere to the timelines for delivery.

14. Support and Maintenance Services

- The support and maintenance requirements are outlined below in this document.

15. Role and Responsibilities

- In this SOW, we use the RASCI ("responsible, accountable, supporting, consulted and informed") chart approach for all roles and responsibilities matrices.

a) The RACI terminology is as follows:

Code	Role	Role Detail Description	
R	Responsible	▪ Individual operationally responsible for performing a sourcing activity. ▪ Responsible individuals report to the Accountable individual.	▪ Only one individual is accountable for any given activity. ▪ Responsible is a proactive role.
A	Accountable	▪ Individual with final accountability for the results of a sourcing activity. ▪ Accountability includes a mandate to dismiss or accept the results by activity as realized by the Responsible individual. ▪ This individual also holds the budget to back the mandate.	▪ Only one individual is accountable for any given activity. ▪ Accountable is a reactive role.
S	Supporting	▪ Individuals who support the Responsible individual in realizing the sourcing activity. They actively participate in realizing/executing/performing the activity. ▪ Supportive individuals report to the Responsible individual.	▪ Multiple individuals can participate in support of the Responsible individual for any given activity. ▪ Supporting is a proactive role.
C	Consulted	▪ Individuals who should be consulted in realizing/executing/performing the activity, on the scope, budget, time, and value of the activity.	▪ Multiple individuals can be required to be heard for any given activity. ▪ Consulted is a reactive role.
I	Informed	▪ Individuals who need to be informed but have no role in the realization/execution/performance of an activity, other than being informed of the result of the activity.	▪ Multiple individuals can be informed of the results of any given activity. ▪ Informed is a passive role.

Table 6 - Definition of RASCI Model

The following table identifies the roles and responsibilities associated with this SOW.

b) Roles and Responsibilities- General

Sub area	Number	Task/Activity	Service Provider	ACSA
General	6	Provide Services and the supporting processes that support ACSA business needs, technical requirements, and End-User requirements	R, A	C
	7	Comply with ACSA policies, guiding principles, standards, and regulatory requirements applicable to the ACSA for information, information systems, personnel, physical and technical security	R, A	C
	8	Develop and maintain an approved comprehensive Standards and Procedures Manual that contains the standards, processes and procedures that will be used in the delivery of all Services. The manual will include clearly delineated roles and responsibilities, touch points and measurements between ACSA and the vendor.	R, A	C

	9	Approve the comprehensive Standards and Procedures Manual that contains the standards, processes and procedures that will be used in the delivery of all Services. The manual will include clearly delineated roles and responsibilities, touch points and measurements between ACSA and the vendor.	I	R, A
	10	Report performance against Service-Level Requirements (SLRs)	R, A	I
	11	Coordinate all Changes to the IT systems that may affect the SLRs of any other Service	R, A	C, I
	12	Provide timely creation, updating, maintenance and provision of all appropriate project plans, project time and cost estimates, technical specifications, management documentation and management reporting in a form/format that is acceptable to the ACSA for all Service projects and major Service activities	R, A	C
	13	Adhere to IT service management (ITSM) best practices and Key Performance Indicators (KPIs)	R, A	I
	14	Approve the use of the ITSM best practices and KPIs	C, I	R, A

Table 7 - Roles and Responsibilities – General

c) Roles and Responsibilities - Management, Planning, and Design

Architecture Planning and Analysis Services are the activities required to assess the requirements for architectural, functional, performance, IT Service Continuity, and security requirements. Activities associated with the documenting the requirements for architectural, functional, performance, IT Service Continuity, and security requirements. Include identifying the opportunities to improve the efficiency and effectiveness of the Service. Can also help support competitive business advantage and mitigate risks by reducing defects and improving the quality of IT Services look at current and how to bring in efficiencies and improvements.

Sub area	Number	Task/Activity	Provider	ACSA
Architecture Planning and Analysis	1.	Adhere to, implement, and ensure alignment to the defined standards, timeframes and reporting requirements for planning, project management and analysis activities.	R, A	C,S,I
	2.	Attend and actively participate in the ACSA scheduled focus groups, stakeholder meetings, project, and technical workshops to provide the required expertise (addressing all tasks pre and post the meeting as required such as requirements gathering activities; solution design options)	R, A	C, S, I
	3.	Provide input into the review of the existing Services, architectural standards and project management practices for Planning and Analysis activities to ensure continuous alignment to best practise.	R, A	C, S, I
	4.	Ensure all documentation remains updated in required ACSA format. Where no existing documentation is available, the standards are to be followed and documentation to be drafted.	R, A	C, I
	5.	Define Services, standards, timeframes and reporting requirements for planning, project management, and analysis activities	C, S, I	R, A
	6.	Schedule the required focus groups and technical workshops for architecture planning and analysis requirements – such as to review the existing infrastructure topologies at an enterprise (e.g., technology	S, I	R, A

Sub area	Number	Task/Activity	Provider	ACSA
		strategy, technology architecture, functional, availability, capacity, performance, backup, and IT Service Continuity)		
	7.	Provide ACSA documentation format standards. Review and approve updated documentation presented by Service provider	I	R, A
	8.	Review and update the existing Services, standards and project management practices for Planning and Analysis activities	I	R, A
Technical Architecture	9.	Attend, actively participate in and provide technical assistance and subject matter expertise in technical and business planning sessions to review standards, architecture and project initiatives to align with best practise	R, A	C, S, I
	10.	Document current and future Technical Architecture in the agreed formats and update these throughout the service lifecycle	R, A	C, S, I
	11.	Perform evaluation of new equipment considered for implementation in compliance with the ACSA's security and IT architecture policies, regulations, and procedures.	C, S, I	R, A
	12.	Define and approve any new architecture standards	C, S, I	R, A
	13.	Conduct technical and business planning sessions to review standards, architecture, and project initiatives to align with best practises	R, A	C, S, I
Continuous Improvement and Innovation Planning	14.	Conduct technical reviews and provide recommendations for improvements that increase efficiency, effectiveness and reduce costs	R, A	C, I
	15.	Perform ad hoc investigations as requested by ACSA and submit recommendations for ACSA's consideration.	R, A	C, I
	16.	Conduct on-going, regular planning and recommendations for technology refresh and upgrades	R, A	C, I

Sub area	Number	Task/Activity	Provider	ACSA
	17.	Showcase new technology enhancements to ACSA hence allowing ACSA the option to upgrade to any new productised technology.	R, A	C, I
	18.	Review and approve any technical improvement recommendations	C, I	R, A
	19.	Review and approve any requested ad hoc investigations	C, I	R, A
	20.	Review and approve recommendations for technology refresh and upgrades	C, I	R, A
	21.	Review any new technology enhancements presented	C, I	R, A
Management and Testing Tools	22.	Use existing System management tools to monitor measure, manage and document the environment.	R, A	C, I
	23.	Provide access to existing System management tools to monitor measure, manage and document environment	C, I	R, A
Research	24.	Provide expert advice and research latest technologies on a constant basis and formally submit these presentations to ACSA IT Infrastructure on a 3-monthly basis.	R, A	C, I
	25.	Together with ACSA-IT perform feasibility studies for the implementation of new and existing technologies that best meet ACSA business needs and meet cost, performance, and quality objectives.	R, A	C, I
	26.	Review the latest technologies presented by the Service provider.	C, I	R, A
Design and panning		Provide design documentation for quarterly audits as requested by ACSA	R, A	C, I
	27.	Provide input into design plans through coordination with the appropriate ACSA technology standards groups and design architects	C, I, S	R, A

Sub area	Number	Task/Activity	Provider	ACSA
	28.	Quarterly audit of design documentation	C, I, S	R, A
	29.	Adhere to production acceptance test criteria	R, A	C, I
	30.	Conduct and document test plans and results	R, A	C, I
	31.	Define and document production acceptance test criteria	C, I	R, A
	32.	Review and approve test plans and results	C, I	R, A

Table 8 - Roles and Responsibilities - Management, Planning, and Design

d) Roles and Responsibilities - Project Management Services

ACSA may from time-to-time request that the provider perform a discrete set of activities in addition to the on-going services obligations. (a "Project").

Sub area	Number	Task/Activity	Provider	ACSA
Project Management Approach	1.	Utilise project management methodologies, knowledge, skills, tools, and techniques consistent with leading internationally recognised and accepted project management practices such as those contained in the Guide to the Project Management Body of Knowledge (PMBOK) or Prince2	R, A	C, I

Sub area	Number	Task/Activity	Provider	ACSA
	2.	Perform project management review and oversight, attend scheduled project meetings, ensure key milestones are achieved by Service provider, ensure all ACSA project governance processes are in place and are being achieved throughout the project	C, I	R, A
Define Project Plan	3.	Provide project definition and plan, identify major critical milestones, ensure delivery within budget and project deliverables aligned and approved by the ACSA Project Manager	R, A	C, I
	4.	Provide, maintain, and update detailed project planning, identify critical path dependencies.	R, A	C, I
	5.	Approve project plan, critical milestones, budget forecast, and project deliverables	C, I	R, A
	6.	Attend scheduled weekly project meetings to review detailed project plan and critical path dependencies	C, I	R, A
Manage Execution of the Project Plan	7.	Manage, follow up and track execution of project plan.	R, A	C, I
	8.	Ensure project plan management activities are carried out and ensure updated communication to project stakeholders is done.	C, I	R, A

Table 9 - Roles and Responsibilities - Project Management Services

e) Roles and Responsibilities - Documentation

Documentation Services are the activities associated with developing, revising, archiving, maintaining, managing, reproducing, and distributing information (e.g., project planning materials, System design specifications, Procedures Manuals, operations guides) in hard copy and electronic form.

Sub area	Number	Task/Activity	provider	ACSA
Documentation	1.	Ensure that the entire in scope is well documented and constantly updated	R, A	C, I
	2.	Compile a checklist and all documentation for carrying out of maintenance tasks related to in scope infrastructure (detailed maintenance plan). Provide exception reports where risks and issues cannot be addressed via the maintenance plan	R, A	C, I
	3.	A detailed checklist template will be presented to the ACSA for approval.	R, A	C, I
	4.	Specify the content, purpose, format and production schedule of all documents	R, A	C, I
	5.	Store all copies of documents on ACSA Microsoft Teams sites provided.	R, A	C, I
	6.	Review and approve in scope documentation to ensure infrastructure is well documented and constantly updated	I	R, A
	7.	Review checklist and implement action plans based on any exception reports and recommendations	I	R, A
	8.	Work with provider to specify the content, purpose, format and production schedule of all documents within scope	C, I	R, A
	9.	Provide space to store physical copies of all documents and share folder for digital copies of the documents	I	R, A

	10.	Provide timely creation, updating, maintenance and provision of all documentation, (design documents; architectural diagrams; as built documents; test plans; all ACSA required project documentation; technical specifications, preventative and corrective maintenance plans and checklist; escalation reports; daily service request report; floor layout diagrams; OEM and third party documentation and management reporting in a form/format that is acceptable to ACSA for Service Projects and major Service activities	R, A	C, I
	11.	Manage all documentation in accordance with Configuration Management standards and guidelines	R, A	C, I
	12.	Document standard operating procedures (e.g., boot, failover/disaster recovery/COOP, spool management, batch processing, backup)	R, A	I
	13.	Review and approve standard operation procedures Documentation	I	R, A

Table 10 - Roles and Responsibilities – Documentation

f) Roles and Responsibilities – Maintenance

Maintenance Services are the activities associated with the maintenance and repair of hardware, software to include "break/fix" Services. Installed platform and product version levels are not to be more than one version behind the current commercial release, unless coordinated with ACSA architectural standards committee.

Sub area	Number	Task/Activity	Provider	ACSA
Maintenance	1.	Define Maintenance requirements	I	R, A
	2.	Develop, document and maintain in the Standards and Procedures Manual Maintenance procedures that meet requirements and adhere to defined policies	R, A	I
	3.	Develop Maintenance schedules (OEM recommended preventative maintenance to be considered)	R, A	
	4.	Review and approve Maintenance procedures and schedules	I	R, A
	5.	Ensure appropriate Maintenance coverage for all Service components	R, A	C, I
	6.	Provide Maintenance and break/fix support in ACSA's defined locations, including dispatching repair technicians to the point-of-service location if necessary	R, A	C, I
	7.	Perform (and/or coordinate with Third-Party Maintenance Vendor if applicable) diagnostics and maintenance on Service components, including hardware, software, peripherals, and special-purpose devices as appropriate	R, A	C, I
	8.	Perform an analysis of the impact and/or applicability of Vendor-provided (e.g., Omni) patches and/or service packs, in accordance with ACSA policies and requirements	R, A	C, I
	9.	Approve Vendor-provided patches and/or service packs	C, I	R, A
	10.	Review all patches relevant to the IT environment and classify the need and speed at which the Security patches should be installed, as defined by policies and Change Management	R, A	C, I
	11.	Install patches per ACSA's Change Management process and procedures including acquiring required ACSA approval	R, A	C, I
	12.	Install (and/or coordinate with Third-Party Maintenance Vendor if applicable) manufacturer field change orders, service packs, firmware and software maintenance releases, etc.	R, A	C, I
	13.	Perform (and/or coordinate with Third-Party Maintenance Vendor if applicable) product patch, "bug fix," service pack installation or upgrades to the current installed version	R, A	C, I

Sub area	Number	Task/Activity	Provider	ACSA
	14.	Perform Maintenance-related software distribution and version control, both electronic and manual	R, A	C, I
	15.	Replace (and/or coordinate with Third-Party Maintenance Vendor if applicable) defective parts, including preventive Maintenance, according to the manufacturer's published mean-time-between-failure rates	R, A	I
	16.	Conduct (and/or coordinate with Third-Party Maintenance Vendor if applicable) Maintenance and parts management and monitoring during warranty and off-warranty periods	R, A	I
	17.	Execute preventative maintenance per the high-level schedule which needs further development by provider responding to this RFP. The following activities will constitute the minimum requirements. • Inspections and alerts investigations • Syslog analysis – Continuous monitoring and responding with corrective actions to warnings and alerts. • Health Checks • Configuration Backups • Log Analysis • Device performance monitoring for high memory and CPU utilization • Software upgrades on management systems • Capacity Management • User Management • Redundancy Testing • Firmware Upgrades • Advise / recommend improvement for the Self-Service infrastructure and identify potential risks within the environment include detailed additional	R, A	C, I

Sub area	Number	Task/Activity	Provider	ACSA
		preventative maintenance recommendations which as experts in the field are deemed necessary to prevent system failures		
	18.	Initiate projects to execute on approved preventative maintenance recommendations	I, C	R, A
	19.	Provide detailed monthly reports on capacity, assets, changes, faults, potential risks, etc. as defined in the report schedule	R, A	C, I

Table 11 - Roles and Responsibilities – Maintenance

g) Roles and Responsibilities - Infrastructure Monitoring, Operations and Administration

Monitoring, Operations and Administration Services of all in scope infrastructure are the activities associated with providing a stable environment thus ensuring a proactive approach to risk mitigation and will aid the provider to meet their SLA targets.

Management of the Infrastructure will always be done in consultation with ACSA-IT Infrastructure and Operations, and no decisions can be made without approvals and written consent of ACSA.

Sub area	Number	Task/Activity	Provider	ACSA
Management and Administration	1.	Utilise ACSA Monitoring tools to monitor the infrastructure. ensuring that it meets the monitoring and service level reporting requirements	R, A	C, I
	2.	Implement measures for proactive monitoring to limit infrastructure outages.	R, A	C, I
	3.	Manage all in scope Infrastructure elements in accordance with ACSA's policies (including security oversight and change management policies)	R, A	C, I
	4.	Manage and coordinate provider appointed subcontractors and Third Parties to meet Service and SLA requirements	R, A	C, I
	5.	Suggest any additions or changes to ACSA monitoring tools landscape	R, A	C, I
	6.	Install, customise, and maintain system for event monitoring and availability reporting.	I	R, A

Sub area	Number	Task/Activity	Provider	ACSA
	7.	Implement measures for proactive monitoring to limit infrastructure outages	I	R, A

Table 12 - Roles and Responsibilities - Infrastructure Monitoring, Operations and Administration

h) Roles and Responsibilities - Availability Management

The goal of Availability Management is to understand the overall availability requirements of ACSA's business needs and to plan, measure, monitor and continuously strive to improve the availability of the IT Infrastructure, services and supporting IT organization to ensure these requirements are met consistently, with a focus on providing cost-effective availability improvements that deliver measurable ACSA business benefits.

Availability Management covers the evaluation, design, implementation, measurement, and management of the IT Infrastructure Availability from a component and an end-to-end perspective (i.e., Services), including new or modified IT Service Management methodologies and tools, as well as technology modifications or upgrades of IT Infrastructure systems and components. The goal of the Availability Management process is to optimize the capability of the IT Infrastructure, services and supporting organization to deliver a cost-effective and sustained level of Availability that enables the business to satisfy its business objectives.

Key activities of the Availability Management process are as follows:

- Determining business unit availability requirements for a new or enhanced IT Service and formulating the availability and recovery design criteria for the IT Infrastructure to ensure IT Services are designed to deliver the appropriate levels.
- Determining the critical business functions and impact arising from IT component failure. Where appropriate, review the availability design criteria to provide additional resilience to prevent or minimize impact to the business.
- Identifying opportunities to optimize the availability of the IT Infrastructure to deliver cost-effective improvements that deliver tangible business benefits.
- Supporting the targets for availability, reliability and maintainability for the IT Infrastructure components that underpin the IT Service, to enable these to be documented and agreed within SLAs and contracts.
- Establishing measures and reporting of availability, reliability and maintainability that reflect the business, End-User, and IT support organization perspectives.
- Monitoring and trend analysis of the availability, reliability and maintainability of IT systems and components

- Reviewing IT Service, system, and component availability, identifying unacceptable levels and ensuring appropriate corrective actions are taken to address IT availability shortfalls.
- Investigating the underlying reasons for unacceptable availability and providing recommendations for resolution
- Producing and maintaining a forward-looking Availability Plan, which prioritizes and plans overall IT availability improvements aimed at improving the overall availability of IT Services and Infrastructure components to ensure that existing and future business availability requirements can be met.
- Providing IT availability reports to ensure that agreed levels of availability, reliability and maintainability are measured and monitored on an ongoing basis.

Sub area	Number	Task/Activity	Provider	ACSA
Availability Management	1.	Establish criteria and SLRs for Availability Management support requirements, including IT systems and services to be covered	C, I	R, A
	2.	Develop Availability Management policies, processes, and procedures, and determine appropriate Availability Management tools and methods that support ACSA's Availability Management support requirements	R, A	I
	3.	Participate in the development of Availability Management policies, process, and procedures, and identify the tools and availability methods to be used	I	R, A
	4.	Review and approve Availability Management policies, processes, and procedures	I	R, A
	5.	Implement agreed-upon Availability Management policies, processes, and procedures	R, A	I
	6.	Provide unrestricted read access by ACSA-authorized staff and designated personnel to all current and historical availability knowledgebase data and records	R, A	I
	7.	Ensure that availability requirements are included when requirements are identified when upgrading and/or designing new IT systems and services to support business users	I	R, A

	8.	Participate in user requirements gathering and analysis when upgrading and/or designing new IT systems and services, to ensure that they are designed to deliver the required levels of availability (mapped to the SLRs) required by the business	R, A	I
	9.	Create availability and recovery design criteria to be applied to upgrades and/or new or enhanced infrastructure design	R, A	I
	10.	Participate in creating availability and recovery design criteria to be applied to upgrades and/or new IT Infrastructure system and services design	I	R, A
	11.	Coordinate with the IT service support and IT service delivery process owners and managers from ACSA to research, review and assess Availability issues and optimization opportunities	R, A	C, I
	12.	Define the availability measures and reporting required for the IT Infrastructure and its components that underpin an upgrade and/or	I	R, A
		new IT Service, as the basis for an SLA that reflects business, End-User and IT support organization requirements		
	13.	Participate with ACSA in defining the availability measures and reporting requirements	R, A	I
	14.	Recommend appropriate tools and practices to measure and report on agreed-upon availability measures for upgraded and/or enhanced IT Infrastructure	R, A	I
	15.	Review and approve availability measurement tools and practices	I	R, A
	16.	Ensure that approved availability measurement tools and practices are implemented	R, A	I
	17.	Monitor and maintain an awareness of technology advancements and IT best practices related to availability optimization, and periodically provide updates to ACSA IT management	R, A	I

18.	Ensure that all Availability Management improvement initiatives conform to defined Change Management procedures set forth in the Process and Procedures Manual	R, A	I
19.	Coordinate and take ownership of Availability Management across all IT service areas within ACSA and Third-Party Service Vendors (e.g., public carriers, Internet service providers, Third-Party providers, etc.)	R, A	I
20.	Participate in Problem Management review sessions as appropriate, specifically those problems related to outages of critical systems	R, A	C, I
21.	Monitor actual IT availability achieved versus targets and ensure shortfalls are addressed promptly and effectively	R, A	I
22.	Conduct Availability Assessment review sessions and provide cost-justified improvement recommendations	R, A	I
23.	Participate in availability improvement review sessions	I	R, A
24.	Review and approve cost-justifiable improvement recommendations that ACSA deems appropriate to enhance ACSA IT and business performance needs	I	R, A
25.	Coordinate with ACSA and Third-Party Service Vendors to gather information on IT systems and service availability issues and trends, to be used for trend analysis	R, A	I
26.	reduce and maintain an Availability Plan that prioritizes and plans approved IT availability improvements	R, A	I
27.	Review and approve Availability Plan	I	R, A
28.	Provide IT availability reporting to ensure that agreed levels of availability, reliability and maintainability are measured, reported, and monitored on an ongoing basis	R, A	I
29.	Promote Availability Management awareness and understanding within all IT support organizations, including Third-Party Service Vendors	R, A	I

	30.	Perform regular (e.g., quarterly) reviews of the Availability Management process and its associated techniques and methods to ensure that all are subjected to continuous improvement and remain fit for purpose	R, A	I
	31.	Periodically audit the Availability Management process to ensure that it continues to deliver desired results in compliance with agreed- upon policies, processes, and procedures	I	R, A

Table 13 - Roles and Responsibilities - Availability Management

i) Roles and Responsibilities - Capacity Management

Capacity Management Services are the activities associated with ensuring that the capacity of the Service matches the evolving demands of ACSA business in the most cost-effective and timely manner. The process encompasses the following:

- Monitoring of performance and throughput of IT Services and supporting IT components
- Understanding current demands and forecasting for future requirements
- Developing capacity plans which will meet demand and SLRs.
- Developing modelling and conducting simulations to manage capacity.
- Conducting risk assessment of capacity recommendations
- Developing and implementing a capacity plan including the financial impact of the Service
- Undertaking tuning activities

Sub Area	Number	Task/Activity	Provider	ACSA
Capacity Management	1.	Define Capacity Management requirements	I	R, A
	2.	Develop, document, and maintain in the Standards, Process and Procedures Manual Capacity Management procedures that meet requirements	R, A	I
	3.	Review and approve Capacity Management process and procedures	I	R, A
	4.	Establish a comprehensive Capacity Management planning process	R, A	I
	5.	Review and approve Capacity Management planning process	I	R, A
	6.	Define, develop, and implement tools that allow for the effective capacity monitoring/trending of IT Infrastructure, applications, and IT components	R, A	I
	7.	Identify future business requirements that will alter capacity requirements	I	R, A
	8.	Develop a periodic (usually yearly) capacity plan, including quarterly updates	R, A	I
	9.	Develop and implement capacity models and run simulations to validate the capacity plan	R, A	I
	10.	Participate in all capacity planning activities	I	R, A
	11.	Assess capacity impacts when adding, removing, or modifying applications and infrastructure components	R, A	I
	12.	Continually monitor IT resource usage to enable proactive identification of capacity and performance issues	R, A	I
	13.	Capture trending information and forecast future ACSA capacity requirements based on ACSA-defined thresholds	R, A	I

	14.	Assess incidents/problems related to capacity and provide recommendations for resolution	R, A	I
	15.	Recommend changes to capacity to improve service performance	R, A	I
	16.	Assess impact/risk and cost of capacity changes	R, A	I
	17.	Approve capacity-related recommendations	I	R, A
	18.	Maintain capacity levels to optimize the use of existing IT resources and minimize ACSA costs to deliver Services at agreed-to SLRs	R, A	I
	19.	Ensure adequate capacity exists within the IT environment to meet SLRs and requirements, considering daily, weekly, and seasonal variations in capacity demands	R, A	I
	20.	Validate asset utilization and capital efficiency	I	R, A

Table 14 - Roles and Responsibilities - Capacity Management

j) Roles and Responsibilities - Performance Management

Performance Management Services are the activities associated with managing and tuning Service components for optimal performance. The process encompasses the following:

- Monitoring of performance and throughput of IT Services and supporting IT components
- Assessing the results of the reports
- Conducting trending analysis
- Providing recommendations to tune
- Performing tuning activities
- Updating on a periodic basis (at least annually)

Sub area	Number	Task/Activity	Provider	ACSA
Performance Management	1.	Define Performance Management requirements	I	R, A
	2.	Develop, document, and maintain in the Standards, Process and Procedures Manual Performance Management procedures that meet requirements	R, A	I
	3.	Review and approve Performance Management procedures	I	R, A
	4.	Perform Service component tuning to maintain optimum performance in accordance with Change Management procedures	R, A	I
	5.	Manage Service component resources (e.g., devices and traffic) to meet defined Availability and performance SLRs	R, A	I
	6.	Provide monitoring and reporting of Tower component performance, utilization and efficiency based on specified time frame and sequence (e.g., monthly)	R, A	I
	7.	Proactively evaluate, identify, and recommend configurations or changes to configurations that will enhance performance	R, A	I
	8.	Conduct trending analysis to recommend changes to improve performance based on specified time frame and sequence (e.g., monthly)	R, A	I
	9.	Develop and deliver improvement plans as required to meet SLRs based on specified time frame and sequence (e.g., monthly)	R, A	I
	10.	Review and approve improvement plans		R, A
	11.	Implement improvement plans and coordinate with Third Parties as required	R, A	I

	12.	Provide technical advice and support to the application maintenance and development staff as required	R, A	I
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Table 15 - Roles and Responsibilities - Performance Management

k) Roles and Responsibilities - Configuration Management

Configuration Management Services are the activities associated with providing a logical model of the devices or assets (including software licenses) and their relationships by identifying, controlling, maintaining, and verifying installed hardware, software, and documentation (i.e., maintenance contracts, SLA documents, etc.).

The goals are to account for all IT assets and configurations, provide accurate information on configurations, provide a sound basis for Incident, Problem, Change and Release Management, and to verify configuration records against the infrastructure and correct any exceptions. The following table identifies the Configuration Management roles and responsibilities that provider and ACSA will perform.

Sub area	Number	Task/Activity	provider	ACSA
Configuration Management	1.	Define Configuration Management requirements	I	R, A
	2.	Develop, document, and maintain in the Standards Process and Procedures Manual Configuration Management procedures that meet requirements	R, A	I
	3.	Review and approve Configuration Management procedures and processes	I	R, A
	4.	Identify and document the configuration item structure	R, A	I
	5.	Approve the configuration item structure	I	R, A
	6.	Establish Configuration Management database, in accordance with ACSA requirements	R, A	I
	7.	Review and approve Configuration Management database	I	R, A
	8.	Select and provide Configuration Management tools	I	R, A

9.	Install and maintain Configuration Management tools	R, A	I
10.	Enter/upload configuration data into configuration database	R, A	I
11.	Establish process interfaces to Incident and Problem Management, Change Management, technical support, maintenance, and Asset Management processes	R, A	I
12.	Establish appropriate authorization controls for modifying configuration items and verify compliance with software licensing	R, A	I
13.	Establish guidelines for physical and logical separation between development, test and production and the process for deploying and back-out of configuration items	I	R, A
14.	Develop procedures for establishing configuration baselines as reference points for rebuilds, and provide ability to revert to stable configuration states	R, A	I
15.	Develop procedures for establishing security baselines as reference points for rebuilds, and provide ability to revert to stable configuration states	I	R, A
16.	Establish procedures for verifying the accuracy of configuration items, adherence to Configuration Management process and identifying process deficiencies	R, A	I
17.	Provide a deficiency report and steps taken to address the issues identified	R, A	I
18.	Provide ACSA Configuration Management reports as required and defined by ACSA	R, A	I
19.	Audit Configuration Management process and accuracy of configuration data	I	R, A

Table 155 - Roles and Responsibilities - Configuration Management

I) Roles and Responsibilities - Software License Management

Software License Management Services are the activities associated with the identification, acquisition, and disposal as well as ongoing management and tracking of software and their corresponding licenses.

Sub area	Number	Task/Activity	Provider	ACSA
Software License Management	1.	Define Software License Management requirements	C, I	R, A
	2.	Recommend improvements to Software License Management requirements and policies	R, A	I
	3.	Develop, document, and maintain in the Standards and Procedures Manual Software License Management procedures that meet requirements and adhere to defined policies as mapped to Asset Management	R, A	I
	4.	Review and approve Software License Management processes and procedures	I	R, A
	5.	Manage and maintain (e.g., monitor, track status, verify, audit, perform contract compliance, reassign) software licenses and media through software license life cycle	R, A	C, I
	6.	For ACSA-retained contracts, be responsible for procurement, renewal and upgrade costs, and vendor agreements	I	R, A
	7.	For non-ACSA-retained contracts, be responsible for procurement, renewal and upgrade costs, and vendor agreements	R, A	C, I
	8.	Develop and maintain inventory of all Software licenses within the Asset Management system	R, A	I
	9.	Report to ACSA on any exceptions to Vendor terms and conditions including license non-compliance	R, A	I

10.	Periodically (at least yearly), conduct software license and maintenance agreements review, allowing for sufficient time prior to expiration for negotiations	R, A	I
11.	Participate in software license and maintenance agreements review	I	R, A
12.	Provide ACSA with reports and recommendations to use in making software acquisition and discontinuance decisions	R, A	I
13.	Provide recommendations to purchase additional license allocation, recommend alternatives or curtailing usage where necessary and appropriate, to restore or continue to maintain license compliance	R, A	I
14.	Identify and report license compliance issues to ACSA and provide recommendations to resolve the compliance issue	R, A	I
15.	Review license compliance issues and document completed resolution	I	R, A
16.	Manage and perform audits and reconcile the number of licenses to the number of installations, as requested by ACSA	R, A	I
17.	Provide recommendations to ACSA to resolve any software reconciliation issues	R, A	I
18.	Report on resolution to software reconciliation issues	I	R, A
19.	Obtain approval from ACSA for any license change or replacement	R, A	I

Table 16 - Roles and Responsibilities - Software License Management

m) Roles and Responsibilities - Change Management

Change Management Services are activities to ensure that standardized methods and procedures are used for efficient and prompt handling of all changes, to minimize the impact of change upon Service quality and consequently to improve the day-to-day operations of ACSA.

Change Management covers all aspects of managing the introduction and implementation of all changes affecting all Towers and in any of the management processes, tools and methodologies designed and utilized to support the Service components.

The Change Management processes and activities are inter-related and complementary with Release Management and Configuration Management, as well as Incident Management and Problem Management.

The Change Management process includes the following process steps:

- Determining metrics for measuring effectiveness of a change
- Request for change (RFC) process.
- Recording/tracking process
- Prioritization process
- Responsibility assignment process
- Impact/risk assessment process
- Participation in IT service continuity and DR planning
- Coordination of the Change Advisory Board (CAB)
- Review/approval process.
- Establishing and managing the schedule of approved changes
- Implementation process
- Verification (test) process
- Closure process

Sub area	Number	Task/Activity	Provider	ACSA
Change Management	1.	Define Change Management policies and requirements, including change priority schema and classifications, per the Change Management process components outlined above	I	R, A
	2.	Develop Change Management procedures and processes per the Change Management process components outlined above	R, A	I
	3.	Review and approve Change Management process, procedures, and policies	I	R, A
	4.	Receive and document all RFCs and classify proposed changes to the Services, which shall include change cost, risk impact assessment and system(s) security considerations	R, A	I
	5.	Review and validate that RFCs comply with Change Management policies, procedures, and processes	I	R, A
	6.	Ensure that appropriate back-out plans are documented and in place in the event of systems failure as a result of the change	R, A	I
	7.	Provide Change Management plan to ACSA for review	R, A	I
	8.	Approved Change Management plan	I	R, A
	9.	Develop and maintain a schedule of planned approved changes (Forward Schedule of Changes [FSC]) for ACSA to review	R, A	I
	10.	Coordinate, schedule, and conduct CAB meetings to include review of planned changes and results of changes made, ensuring that all appropriate parties are invited and represented in accordance with approved CAB policies	R, A	I
	11.	Participate in CAB meetings as ACSA deems appropriate or necessary	I	R, A
	12.	Provide change documentation as required, including proposed metrics as to how effectiveness of the change will be measured	R, A	I

13.	Review and approve change documentation and change effectiveness metrics	I	R, A
14.	Review and approve any RFC determined to have a cost, security, or significant risk impact to ACSA's IT systems or business	I	R, A
15.	Authorize and approve scheduled changes or alter the schedule change requests as defined in the Change Management procedures	I	R, A
16.	Publish and communicate the approved FSC to all appropriate IT and business unit stakeholders within ACSA of change timing and impact	I	R, A
17.	Oversee the approved change build, test, and implementation processes to ensure these activities are appropriately resourced and completed according to change schedule	R, A	I
18.	Ensure that thorough testing is performed prior to release and assess ACSA business risk related to any change that is not fully tested prior to implementation	I	R, A
19.	Participate in business risk assessment for change to be introduced without being fully tested	R, A	I
20.	Monitor changes, perform change reviews and report results of changes, impacts, and change effectiveness metrics	R, A	I
21.	Verify that change meets objectives based upon predetermined effectiveness metrics, and determine follow-up actions to resolve situations where the change failed to meet objects	R, A	I
22.	Review and approve Change Management results	I	R, A
23.	Close out RFCs that met the change objectives or changes that were abandoned	R, A	I
24.	Perform Change Management quality control reviews and audits of Change Management processes and records	c, I	R, A
25.	Provide ACSA Change Management reports as required and defined by ACSA	R, A	c, I

Table 17 - Roles and Responsibilities - Change Management

n) Roles and Responsibilities - Training and Knowledge Transfer

Training and Knowledge Transfer Services consist of the following three types of training the provider will provide:

- Training for the improvement of skills through education and instruction for provider's staff. provider will participate in any initial and ongoing training delivered by ACSA as required that would provide a learning opportunity about ACSA's business and technical environment.
- Training for ACSA-retained technical staff for the express purpose of exploiting the functions and features of the ACSA computing environment. Delivery methods may include classroom-style, computer- based, individual, or other appropriate means of instruction.
- Selected classroom-style and computer-based training (case-by-case basis) for standard COTS and Software as a Service (SaaS) application, including new employee training, upgrade classes and specific skills.

Sub area	Number	Task/Activity	Provider	ACSA
Training and Knowledge Transfer	1.	Define Training and Knowledge Transfer requirements	I	R, A
	2.	Develop, document, and maintain in the Standards and Procedures Manual Training and Knowledge Transfer procedures that meet requirements	R, A	C, I
	3.	Review and approve Training and Knowledge Transfer procedures	I	R, A
	4.	Develop and deliver training program to instruct ACSA personnel on the provision of provider Services (e.g., "rules of engagement," requesting Services)	R, A	C, I
	5.	review and approve provider-developed training program	I	R, A
	6.	Develop, implement, and maintain a ACSA-accessible knowledge database/portal	R, A	C, I
	7.	Develop and implement Knowledge Transfer procedures to ensure that more than one individual understands key components of the business and technical environment	R, A	C, I
	8.	anticipate in ACSA-delivered instruction on the business and technical environment	R, A	C, I
	9.	Develop, document, and deliver training requirements that support the ongoing provision of ACSA Services, including refresher courses as needed and instruction on new functionality	R, A	C, I

	10.	Take training classes as needed to remain current with systems, software, features, and functions for which help desk support is provided, in order to improve Service performance (e.g., First-Contact Resolution)	R, A	C, I
	11.	Provide training when substantive (as defined between ACSA and provider) technological changes (e.g., new systems or functionality) are introduced into ACSA environment, in order to facilitate full exploitation of all relevant functional features	R, A	C, I
	12.	Provide training materials for ACSA technical staff for Level 1- supported applications	R, A	C, I
	13.	Provide ongoing training materials for help desk personnel on ACSA business and technical environments, as defined by ACSA	R, A	C, I
	14.	Provide ACSA-selected classroom-style and computer-based training (case-by-case basis) for standard COTS applications, as requested by ACSA	R, A	C, I

Table 18 - Roles and Responsibilities - Training and Knowledge Transfer

o) Roles and Responsibilities - IT Service Continuity and Disaster Recovery

IT Service Continuity and Disaster Recovery (DR) Services are the activities associated with providing such Services for ACSA applications, and their associated infrastructure (e.g., CPU, servers, network, data and output devices, End-User devices). ACSA applications, associated infrastructure, will receive DR Services according to ACSA's Business Continuity Plan. The provider must demonstrate that it will consistently meet or exceed ACSA's IT Service Continuity and DR Services requirements.

Sub area	Number	Task/Activity	Provider	ACSA
IT Service Continuity and Disaster Recovery	1.	As needed, assist ACSA in other IT continuity and emergency management activities	R, A	I
	2.	Develop and maintain a detailed DR plan to meet IT Service Continuity and DR requirements. Include plans for data, replication, backups, storage management and contingency operations that provide for recovering ACSA's systems within established recovery requirement time frames after a disaster affect ACSA's use of the Services.	R, A	I
	3.	Participate in DR tests	R, A	I, C,S
	4.	Track and report DR test results to ACSA	R, A	I
	5.	Review and approve DR testing results	I	R, A

Table 20 - Roles and Responsibilities - IT Service Continuity and Disaster Recovery

p) Roles and Responsibilities - Service-Level Monitoring and Reporting

Service-Level Monitoring and Reporting Services are the activities associated with the monitoring and reporting Service Levels with respect to Service-Level Requirements (SLRs). In addition, the provider shall report system management information (e.g., performance metrics and system accounting information) to the designated ACSA representatives in a format agreed to by ACSA.

Sub area	Number	Task/Activity	Provider	ACSA
Service-Level Monitoring	1.	Define Service-Level requirements	I	R, A
	2.	Define Service-Level Monitoring and Reporting requirements	I	R, A
	3.	Develop, document, and maintain in the Standards Process and Procedures Manual Service-Level Monitoring and Reporting procedures that meet requirements	R, A	I

Sub area	Number	Task/Activity	provider	ACSA
	4.	Review and approve Service-Level Monitoring and Reporting procedures	C	R, A
	5.	Report on SLR performance and improvement results	R, A	I
	6.	Coordinate SLR monitoring and reporting with designated ACSA representative and Third Parties	R, A	I
	7.	Measure, analyse and provide management reports on performance relative to SLRs	R, A	I
	8.	Conduct SLR Improvement Meetings to review SLRs and recommendations for improvements	R, A	I
	9.	Review and approve SLR improvement plans	I	R, A
	10.	Implement SLR improvement plans	R, A	I
	11.	Review and approve SLR metrics and performance reports	C, I	R, A
	12.	Provide ACSA access to performance and SLR reporting and monitoring system and data	R, A	I

Table 21 - Roles and Responsibilities - Service-Level Monitoring and Reporting

q) Roles and Responsibilities - Financial Management

Manage the financial aspects of the contract. This involves reconciling of billing and internal charge back. This also includes Processes for maintaining financial management of the contract through unnecessary cost elimination.

Sub area	Number	Task/Activity	Provider	ACSA
Financial Management	1.	Adhere to ACSA Standards and Procedures Manual Financial/Chargeback Management and Invoicing procedures.	R, A	I
	2.	Implement corrective actions for billing disparities	R, A	I
	3.	Provide timely and correct invoices to ACSA and/or respective ACSA Operating Divisions	R, A	I
	4.	Provide ACSA Standards and Procedures Manual Financial/Chargeback Management and Invoicing procedures.	I	R, A
	5.	Provide such information as it may reasonably request for it to perform Penalty processes	I	R, A
	6.	Identify billing disparities and work with the provider to identify corrective actions	I	R, A
	7.	provide information to be used for budgeting in line with operating plan	R, A	I
	8.	Assist in monitoring and managing charging/invoicing	R, A	I
	9.	Set budgets in line with operating plan		R, A
	10.	Monitor and manage payment against budgets		R, A
	11.	Maintain an audit trail and records of all costs incurred under the Agreement	R, A	I
	12.	Proactively ensure that all unnecessary costs are eliminated, and that costs are managed in an efficient manner	R, A	I
	13.	Participate in financial review meetings	R, A	I

	14.	Identify areas for potential cost savings and provide input for innovation process where appropriate	R, A	I
	15.	Implement ACSA's invoice and recharge requirements	R, A	I
	16.	Sign-off all delivery notes / Proof of delivery	I	R, A
	17.	Review and approve records of all costs incurred by the provider under the Agreement	I	R, A
	18.	Proactively ensure that all unnecessary costs are eliminated, and that costs are managed in an efficient manner	I	R, A
	19.	Participate in financial review meetings	I	R, A
	20.	Identify areas for potential cost savings and provide input for innovation process where appropriate	I	R, A
	21.	Implement ACSA's invoice and recharge requirements	I	R, A

Table 22 - Roles and Responsibilities - Financial Management

r) Roles and Responsibilities - Human Resources

Human Resource Management Services include the activities associated with the provision and adjustment of appropriate human resources, per workload, to perform the required Services at the required Service Levels:

Sub area	Number	Task/Activity	Provider	ACSA
Skills and Staffing	1.	Ensure that staffing and skill levels are adequate to achieve SLA	R, A	I
	2.	Train and up skill staff as required	R, A	I
	3.	Provide ACSA with staff training plans (especially onsite staff)	R, A	I
	4.	Monitor the staff development	I	R, A
	5.	Proactively keep the provider informed of any requirements that	I	R, A

			would potentially impact on the Service provider's HR resource requirements		
		6.	Define any constraints for the use of Subcontractors	I	R, A
		7.	Approve or reject recommended Subcontractors	I	R, A
		8.	Analyse the impact of any new requests made by ACSA to be implemented by the provider and propose HR resources (skills and staffing) solution	R, A	I
		9.	Analyse the impact of enhanced SLAs (if required by ACSA) on the allocated human resources and propose solution	R, A	I
		10.	Recruit and provide the human resources necessary for the performance of required Services in compliance with SLAs	R, A	I
		11.	Manage Employees time off and replacement	R, A	I
		12.	Recommend Subcontractors for delivery of Services, if applicable	R, A	I
	Performance Monitoring	13.	Continuously monitor the performance of all the human resources made available to ACSA to ensure that the Services comply with the SLAs	R, A	I
		14.	Perform Annual Employee performance reviews	R, A	I
		15.	Consider ACSA satisfaction a key component of the assigned Employee performance reviews	R, A	I
	Change Management	16.	On request by ACSA to designate certain members of staff as Key Employees	R, A	I
		17.	Inform ACSA with a minimum of two weeks' notice of any potential Key Employee staffing changes and of any new Employee assignments planned for new projects and Services	R, A	I
		18.	Assign a new provider Relationship Manager as necessary to discharge the Service provider's responsibilities	R, A	I

	19.	Provide staff turnover data relevant to the Agreement when requested by ACSA	R, A	I
	20.	ACSA to nominate key employees where required	I	R, A
	21.	Request provider staff turnover data when required	I	R, A
	22.	Communicate changes to internal ACSA Stakeholders	I	R, A

Table 23 - Roles and Responsibilities - Human Resources

s) Roles and Responsibilities - Security

- Security Services are the activities associated with maintaining physical and logical security of all Service components (hardware and software) and data, virus protection, access protection and other Security Services in compliance with ACSA's Security requirements.
- Physical Security focuses on the physical access controls implemented to ensure the security of ACSA's and provider's data processing equipment, facilities, and its associated management systems.
- Data Security consists of the activities associated with the classification, management, security and encryption of sensitive/confidential data, and the storage of media containing that data.

Identity and Access Management Services consist of the activities to authorize, authenticate, and provide access control to the IT Infrastructure:

Sub area	Number	Task/Activity	Provider	ACSA
General	1.	Install Security patches per ACSA's Change Management process and procedures, including acquiring required ACSA approval	R, A	I
Physical Security	2.	Provide physical security in conformance with policies, procedures, and practices	R, A	I
	3.	Physically secure data processing equipment, facilities, and storage media from unauthorized access	R, A	I

	4.	Physically protect and store fixed and portable media (e.g., tape, optical, portable hard drives, flash drives) containing sensitive data	R, A	I
	5.	Ensure only authorized personnel have access to data processing equipment, facilities, and storage media	R, A	I
	6.	Track and monitor all physical access and activities performed on data processing equipment and facilities	R, A	I
	7.	Review logs to show the access to data processing equipment was business-justified	R, A	I
	8.	Provide capability to immediately revoke access to data processing equipment, facilities, and storage media	R, A	I
	9.	Maintain physical access audit logs	R, A	I
	10.	Physically secure management systems from unauthorized access	R, A	I
	11.	Ensure only authorized personnel have access to management systems	R, A	I
	12.	Track and monitor all changes performed on management systems	R, A	I
	13.	Provide capability to immediately revoke access from management systems	R, A	I
Data Security	14.	Maintain change audit logs on management systems	R, A	I
	15.	Assume custodial responsibility for all storage media Related to services provided	R, A	I

	16.	Protect portable media while in transit and maintain transmittal records	R, A	I
	17.	Eradicate all data from storage media (server memory, disk, tape, optical, other) before redeployment or disposal, in accordance with ACSA's procedures	R, A	I
	18.	Perform periodic (e.g., monthly) reconciliation reporting of all data media and perform annual audit to reconcile all storage media	R, A	I
	19.	Report reconciliation discrepancies to ACSA and take corrective action to address issue	R, A	I
Identity and Access Management	20.	Provide Identity and Access Management in conformance with ACSA practices, policies, and procedures	R, A	I
	21.	Establish roles, authorized activities and minimum rights granted to Service provider personnel (including non-user accounts)	R, A	I
	22.	Approve roles and authorization activities performed by provider	I	R, A
	23.	Establish and manage processes to support temporary access	R, A	I
	24.	Review and approve user and system user account management process	I	R, A
	25.	Approve Service provider personnel who are authorized to manage user accounts	I	R, A
	26.	Monthly audit production system access logs and activities to identify malicious or abnormal behavior in accordance with established ACSA policies and standards	R, A	I

		27.	Conduct monthly review of all privileged user accounts to ensure the accounts are valid/required, removing inactive and unneeded accounts in accordance with established ACSA policies and standards	R, A	I
		28.	Conduct monthly review of End-User accounts to ensure each user has appropriate minimal permissions required to perform their job functions in accordance with established ACSA policies and standards	R, A	I
		29.	Conduct monthly review of privileged user accounts to ensure each user has appropriate minimal permissions required to perform their job function in accordance with established ACSA policies and standards	R, A	I
	Security Configuration Management	30.	Certify engineering and Configuration Management are secure	R, A	I
		31.	Review and approve engineering designs and Configuration Management security	I	R, A
		32.	Certify equipment meets ACSA's security requirements and provide evidence of compliance	R, A	I
		33.	Periodically review equipment configurations and address any deficiencies or inconsistencies, and provide ACSA with results with detailed recommendations to remediating issues that are found	R, A	I
		34.	Review and approve remediation approach	I	R, A
		35.	Provide ACSA with secure baselines for standard components (e.g., routers, servers, DBMS, etc.)	R, A	I
		36.	Establish a baseline for the secure configuration of Equipment	I	R, A

		based on ACSA's technical control specifications (e.g., CIS benchmark)		
	37.	Recommend changes to baseline to meet ACSA requirements	I	R, A
	38.	Configure equipment to approved security requirements	R, A	I
	39.	provider collaborates with ACSA on plan to implement security patches. This is something	R, A	I
	40.	Install security patches per the Change, Configuration and Release Management processes and procedures	R, A	I
	41.	Establish logging and archiving specifications	R, A	I
	42.	Identify logging and archiving specifications to support business requirements	I	R, A
	43.	Log and archive user and system activity.	R, A	I
	44.	Provide ACSA with reports on any server logs/intrusion detection activities, anomalies or deficiencies that could result in a compromise of the ecommerce system's data confidentially, integrity or system performance	R, A	I
	45.	Provide ongoing support (patches, upgrades, signatures), tuning and management	R, A	I

Table 246 - Roles and Responsibilities – Security

t) Service Management

Objectives

- A key objective of this Managed Service agreement is to attain SLRs.
- SLRs applicable are identified in this Service Management SOW below.
- Specific Service Management SLRs are specified with Fee Reductions, where business is impacted through failure to meet their respective SLRs. SLRs are detailed in the Service-Level Requirements section, and those associated with Fee Reductions are identified in Error! Reference source not found. Error! Reference source not found.
- Provider shall provide written reports to Senior Manager: Applications and Operations regarding provider's compliance with the SLRs specified.

Reports

- The provider shall report to ACSA its performance of the Services against each SLA monthly beginning on the Effective Date, along with detailed supporting information. As part of the standard monthly Service Level reports, the provider shall notify ACSA of any (i) Service Level Failures, and (ii) Penalties to which ACSA becomes entitled.
- The provider shall provide such reports and supporting information to ACSA no later than 5 (five) Business Days following the end of the applicable Measurement Interval. The raw data and detailed supporting information shall be Confidential Information of ACSA.

Root cause analysis

The provider shall promptly investigate and correct Service Level Failures in accordance with the procedures for Root Cause Analysis

u) Support services.

- This refers to day-to-day support activities performed to resolve incidents that are logged by users of the system or logged by monitoring tools or alarm and error logs generated by the system's internal monitoring.
- The provider will be required to attend to and resolve all incidents in line with ACSA incident management processes.
- The response and resolution times depicted below must be adhered to. This will form part of the SLAs that will be agreed to between the provider and ACSA.
- Penalties will be incurred by the provider if the agreed SLA times are not met.
- A good performance on an SLA cannot compensate for a bad performance on another one.

- The fact that an SLA is not associated with a specific service does not mean that this SLA is not important to ACSA.

v) Service-Level Requirements (SLRs)

- The following Service-Level Requirements (SLRs) represent minimum Service levels required. Providers must consistently meet or exceed the following SLRs.

w) Review of Service Levels and KPIS

- On an annual basis after the initial start-up (90 days), ACSA can request a change to any service level by providing notice to the provider that a service level needs to be changed.
- This change can take effect only after the provider has had sufficient time (maximum 3 weeks) to review the requested change and determine if any modifications are required to the delivery of the support and maintenance services. Should changes be required by the provider, then ACSA must allow the provider reasonable time to make such changes before the service-level change takes place.

x) Priority levels

Priority Level 1 — Emergency/Urgent <i>Critical Business Impact</i>	The incident has caused a complete and immediate work stoppage affecting a critical function or critical infrastructure component, and a primary business process or a broad group of users (an entire department, floor, branch, line of business or external customer). No workaround available
Priority Level 2 — High <i>Major Business Impact</i>	A business process is affected in such a way that business functions are severely degraded, multiple users are impacted, a key customer is affected, or a critical function is operating a significantly reduced capacity or functionality. A workaround may be available but is not easily sustainable.
Priority Level 3 — Medium <i>Moderate Business Impact</i>	A business process is affected in such a way that certain functions are unavailable to End Users or a system and/or service is degraded. A workaround may be available.
Priority Level 4 — Low <i>Minimal Business Impact</i>	An incident that has little impact on normal business processes and can be handled on a scheduled basis. A workaround is available or there is minimal negative impact on a user's ability to perform their normal daily work.

Priority Level 5 — Service Requests	End User service requests logged via the Service.
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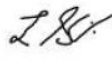
Table 25— Priority Levels

16. Approvals

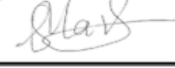
Compiled By: Nkosinathi Ndlovu

Designation: IT Business Analyst

Supported By:

Name & Surname	Designation	Signature	Date
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