ANNEXURE A

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
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. 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.

1.2. Objective

To implement a CRM solution that will initially enable the following business areas:

- Network Planning Standard and Performance: for management of Query management and Operational Stakeholder Management
- HR Shared Services: for management of Employee Queries
- Corporate Services: for Stakeholder Relations Management

The solution must have the capacity to be expandable to other business areas in the future.

1.3. Background

ACSA is focused on providing high-quality customer service across all nine (9) airports and increasing the customer satisfaction index. To achieve this, ACSA requires a solution that will enable the business to efficiently perform customer engagement and service in a standardised manner.

2. RFP Scope

2.1 The CRM solution must enable the following minimum business capabilities:

- Customer query management
- Employee query management
- Key account management (Operational Stakeholders)
- Stakeholder relations management
- Sales Pipeline Capabilities

2.2 The CRM solution's scope will include users based at ACSA Corporate Office and 9 Airport sites and any other airport (s) that ACSA manages.

2.3 Implement a cloud-based CRM solution where data is hosted in countries with equal or better data privacy laws as South Africa, e.g., the European Union.

2.4 Integration with various systems in the environment, such as Microsoft Outlook, Active Directory, Enterprise Resource Planning (ERP) System, SharePoint, Voice Recording System, Call Management System, and Service Now.

2.5 Licences for the estimated types of users as indicated in the following table:

Function	Estimated number of users
Customer Query Management	200 (Super users = 5)
Key Account Management	50 (Super users = 3)
Stakeholder Relations Management	80 (Super users = 5)
Employee Query Management	12 agents (Super users = 12)
Employees	2101
Total	2443

Table 2: Scope of users

2.6 Software testing including but not limited to unit, functional, performance, penetration, and vulnerability testing.

2.7 All user groups training.

2.8 Change management.

2.9 Support and maintenance.

2.10 2.10 Send and Receive communication on all channels/platforms The solution must be accessible on Windows-based laptops, PC's, mobile devices, and tablets.

3. ACSA's Business Requirements

The following requirements are for the departments and functions in the initial scope of the Customer Relationship Management solution.

3.1. Network Planning Standard and Performance: Customer Query Management

The following table consists of requirements for Network Planning Standards and Performance.

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
BR1.1	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.		
BR1.2	All queries must have a unique identifier.		
BR1.3	The system must be able to receive and log queries from various channels such as (not limited): Email, Mobile Applications, SMS, Website, Live Chat, social media (Twitter, Facebook, Instagram, GooglePlus and WhatsApp) and Infogate		
BR1.4	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.		
BR1.5	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.		

BR1.6	The system must have an option to manually assign an airport to a query and an agent to work on a query.		
BR1.7	The business must be able to capture the turnaround times for each query type according to the applicable business rules.		
BR1.8	**BR1.8.1** 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. **BR1.8.2** 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.		
BR1.9	The agent must be able to re-direct a query to Service Now (SNOW) if it requires resolution by IT Service Desk and Technical helpdesk for maintenance. This will be in the case of queries related to Wi-Fi, mobile application, infrastructure maintenance (incident) etc.		
BR1.10	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.		
BR1.11	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.		
BR1.12	**Query Escalation**		

	The unresolved query must be escalated based on escalation business rules that are captured on the system.		
BR1.13	**Social Media** **BR1.13.1** There must be a module with a consolidated view of all ACSA Social Media pages. **BR1.13.2** The system must create and display a word cloud based on mentions that are related to ACSA. **BR1.13.3** The system must be able to identify and create a query from social media mentions and trends related to ACSA. **BR1.13.4** 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.		
BR1.14	**Live Chat Capability** **BR1.14.1** There must be a chatbot that will first respond to frequently asked questions (FAQs) and then escalate to an agent if unable to assist a customer. **BR1.14.2** There must be a capability to chat with customer(s) on the ACSA website. **BR1.14.3** A query resolved during a chat must be logged on the system as a closed query. **BR1.14.4** 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.		
BR1.15	**Customer profile**		

	BR1.15.1 The system must create and store a customer profile from a received query, e.g., 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. **BR1.15.2** The queries that are in the system must be associated with a customer. **BR1.15.3** The system must allow users to generate and send messages (SMS, email, publish to the mobile application) to customers in alignment with POPIA.		
BR1.16	**Integration with CISCO call manager system** **BR1.16.1** 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 the callers' cell phone number. **BR1.16.2** The customer details must be automatically populated on the form. **BR1.16.3** 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.		
BR1.17	**Spam detection** **BR1.17.1** 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.		

	BR1.17.2 The system must be able to detect and flag spam emails.		
BR1.18	**Surveys** **BR1.18.1** The system must allow users to create, update, and delete survey questions. **BR1.18.2** Users must be able to send/publish a survey. The customer's consent is required. **BR1.18.3** The system must be able to receive survey responses from customers. **BR1.18.4** The system must automatically send an automated satisfaction survey to a customer whenever a query is closed. The survey must be sent via a channel (email or SMS) used to communicate with a customer. The system must automatically send an automated satisfaction survey to a customer whenever a query is closed. The survey must be sent via a channel (email or SMS) used to communicate with a customer. **BR1.18.5** The system must analyse the survey responses and generate insights (built-in intelligence) based on responses.		
BR1.19	**SMS for flight information requests** **BR1.19.1** The Service Provider must provide the capability to send and receive SMS. **BR1.19.2** The system must be able to receive the SMS for flight information status queries and respond to the customer with flight information details. **BR1.19.3** 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.		
BR1.20	**Setting performance targets** **BR1.20.1** The system must allow users to capture targets for a business unit (airport). **BR1.20.2** The system must track the business unit's performance against the set targets. **BR1.20.3** The system must track the agent's performance based on assigned queries.		
BR1.21	**Reports** **BR1.21.1** The system must allow users to generate reports reflecting performance on query resolution per airport, organisation and per agent. **BR1.21.2 Customize Reports -** The reports must be exportable to Excel and PowerPoint.		
BR1.22	**Dashboard** The system must have a live dashboard that will show query breakdown per channel, query types, status, SLA violations, top trending query categories, agent, and airport performance, etc.		
BR1.23	**Archiving** The query records must be stored in line with ACSA Information Management Policy.		
BR1.24	**Business Intelligence** The system must provide business intelligence (BI) features to accurately monitor and measure customer service factors. The system needs to provide insights into customer satisfaction for better customer retention.		
BR1.25	**Search**		

	The system must have a data search function allowing users to search using various keywords.		
BR1.26	**Sales Pipeline Capabilities** The system must have sales pipeline capabilities. (*The capability must be priced as part of this RFP, and these licenses will not be included for the initial signed contract, will be only included as and when the business is ready for this functionality*)		

Table 3 Customer Query Management

Network Planning Standard and Performance: Key Account Management (Operational Stakeholders)

Operations Management (NPSP) requires the conversion of the manual key account planning tool they are currently utilising into an automated system. The following requirements are based on the key account planning (KAP) tool that the key account managers use. The tool will be shared with Service Providers. Approximately 700 ACSA Stakeholders comprising of retail tenants, advertising concessionaires, airlines, car rentals etc.

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
BR2.1	Capture key account plan. **BR2.1.1** The system must have the function to allow users to capture key account plans. **BR2.1.2** The system must allow a Business to have multiple key account plans for instances where a key account has a presence in different airports. **BR2.1.3** A key account plan must be visible to the Business, Airport GM, and users that report to the Airport GM and Centre of Excellence. **BR2.1.4** The Business must be able to share the Key Account Plan with other airports. **BR2.1.5** The system must consolidate the Key Account Plans into a single view for Key Accounts with multiple plans.		
	The key account plan must have the following areas:		
BR2.2	Stakeholder understanding		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR2.2.1 The tab must consist of sections to capture: **BR2.2.1.1** Stakeholder description, Address of the stakeholder, Industry, number of employees, financial year end, Current South African footprint. **BR2.2.1.2** Stakeholder strategic focus consisting of stakeholders' vision, Stakeholder's Mission, and Stakeholder's long-term goals/priorities. **BR2.2.1.3** 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. **BR2.2.2** 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. **BR2.2.3** The system must have a stakeholder matrix where the user can indicate whether a stakeholder has a high or low level of influence.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR2.2.4 The system must display news related to a stakeholder and its country of origin.		
BR2.3	**Industry understanding** **BR2.3.1** The tab must consist of sections to capture. **BR2.3.1.1** The Competitive Landscape, including industry players, Current South African footprint, and Revenue for the last financial year. **BR2.3.1.2** Industry trends, including local and global industry trends more likely to affect the stakeholder, the likelihood of how the stakeholder and the industry would be affected, comments. **BR2.3.1.3** The system must display news on this tab that is related to or affecting the stakeholder's industry.		
BR2.4	**Stakeholder decision-making unit** **BR2.4.1** The tab must consist of sections to capture. **BR2.4.1.1** Stakeholder's decision-making units (executives, senior management etc.), including Name, Surname, Position, Key responsibilities/issues falling within		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	their mandate, Telephone number, Email. **BR2.4.1.2** Other relevant contact person within the stakeholder's organisation, including Name, Surname, Position, Key responsibilities/issues falling within his/mandate, Telephone number, and Email.		
BR2.5	Stakeholder engagement plan **BR2.5.1** The tab must consist of sections to capture. **BR2.5.1.1** 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. **BR2.5.2** Stakeholder Owner must be a drop-down list linked to active		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	directory with selected people mandated to be stakeholder owners. **BR2.5.3** There must be an indicator to specify whether an activity is an internal or external activity. **BR2.5.4** The Objectives of the Engagement Before the Engagement and Information/Data to be Sent to Stakeholder Before the Engagement. It must only apply to internal activity.		
BR2.6	Value captured **BR2.6.1** The tab must consist of sections displaying. **BR2.6.1.1** 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. **BR2.6.1.2** non-financial value derived by ACSA from the stakeholder, including value category and description of the non-financial value captured. **BR2.6.1.3** The financial values should be from the Oracle Finance module with revenue breakdown based on an airport/region and as an		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	aggregated/rolled up amount if the stakeholder is in multiple airports.		
BR2.7	**Stakeholder journey** **BR2.7.1** The tab must consist of sections to capture. • **BR2.7.1.1** 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. • **BR2.7.1.2** 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. **BR2.7.2** The system must show and track activities for each journey phase, except when a stakeholder is in the tender and operate phase. **BR2.7.3** The user (Business) must be able to add timelines for each journey phase. **BR2.7.4** The system must be able to send an alert to the business when a		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	deadline for a phase is about to be reached. **BR2.7.5** The system must be capable of sending an escalation when a deadline for a phase is missed. **BR2.7.6** The system must have an additional column to track progress and capture an activity's output. **BR2.7.7** The user must be able to add additional activities to a list of predefined activities for a phase. **BR2.7.8** The system must monitor that the next phase of a journey is not initiated whilst the current stage still needs to be completed.		
BR2.8	**Contract tab** **BR2.8.1** The tab must consist of sections to capture. **BR2.8.1.1** The stakeholders' contract and capture contract manager, contract start date and end date for an account (stakeholder). **BR2.8.2** The system must auto-send alerts to the Business when a contract is about to reach an end (expiry) date.		
BR2.9	**Activity tracker**		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR2.9.1 The tab must consist of sections to capture. **BR2.9.1.1** Definitions for the types of decisions. **BR2.9.1.2** List of decisions grid with decisions, Decision rights per Operations Management team members and Additional comments. **BR2.9.1.3** Dependencies (areas a stakeholder depends on ACSA) include dependency, Impact on Stakeholder's Operations, Responsible Person within Stakeholder's organisation, and Additional Comments. **BR2.9.1.4** 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. **BR2.9.1.5** 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,		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	Progress report sent to Stakeholder (Yes/No), Additional comments. **BR2.9.2** The users must be able to select an activity type as Decision, Issue or Initiative. The system must change the fields as per the selected option based on fields and apply the relevant SLA for a type of activity. **BR2.9.3** The system must allow users to link an activity to a dependency. **BR2.9.4** The system must be able to track the progress of each Dependency and Initiative. **BR2.9.5** The decision-making matrix must have a field for capturing the summary of a stakeholder issue that requires a decision. **BR2.9.6** The decision-making matrix must have column headings as Decision, Make, Approve, Input, and Notify User must be able to select a person's name and surname under each heading. **BR2.9.10** The system must display the selected person's name, surname and email address on the decision-making matrix from Active Directory.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
BR2.10	**Survey capability** **BR2.10.1** The user must be able to create, change, update, and delete survey questions. **BR2.10.2** 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. **BR2.10.3** The system must be able to receive responses to a survey. **BR2.10.4** The system must be able to analyse responses and give insights. **BR2.10.5** The user must be able to generate a report based on survey responses. **BR2.10.6** The system must allow exporting of survey responses to Excel.		
BR2.11	**Engagement Capability** **BR2.11.1** Users must be able to create and send communication on all platforms to account stakeholders using the system. **BR2.11.2** The email or SMS must be stored as part of communication with stakeholders.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR2.11.3 The system must show the stakeholder owner's outlook calendar. **BR2.11.4** 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. **BR2.11.5** The users must be able to indicate or filter roles that should be added to the communication created from the system. **BR2.11.6** The users must be able to schedule an engagement directly from a stakeholder engagement plan. **BR2.11.7** The system must send reminders to all invitees a day before the meeting start time and two (2) hours before the meeting start time. **BR2.11.8** The system must send an email of the latest news related to an account to ACSA representatives invited to a meeting.		
BR2.12	**Dashboard** **BR2.12.1** The system must have a real-time dashboard showing details of the stakeholder activity.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
BR2.13	**Reports** The system must allow users to create and generate their reports.		
BR2.14	**Search** **BR2.14.1** The system must be capable of searching for data in the system.		

Table 4: Key Account Management Requirement

3.2. HR Shared Services: Employee Query Management

The following table consists of requirements for Employee Query Management

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
BR3.1	The system must be able to receive queries logged from different channels. The channels are: • Contact Centre/walk-in • Self-service (directly on the CRM system) • Email • HR Kiosk • Oracle Employee or Manager Self-Service. The system must generate a unique reference number for all queries.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
BR3.2	**Query form** **BR3.2.1** The system must have a query form that employees can access on Oracle Employee or Manager Self-Service portal whereby employees can capture and submit HR-related queries. **BR3.2.2** The query form must be pre-populated with the employee's Name, Surname, email address, contact number, Pay point, Location, ID number, permit number, position, department, Cost Centre, and contact number from Oracle. **BR3.2.3** A submitted query must be logged onto the relevant HR Employee Services based on Pay Point.		
BR3.3	**Automatically log queries logged from HR Kiosk.** **BR3.3.1** The system must be able to receive queries that are logged from HR Kiosk automatically. **BR3.3.2** The CRM system must generate and send the employee a reference number for a query.		
BR3.4	**Logging a categorised query** These are queries logged by an agent directly on the CRM system, on employee self-service or manager self-service and from HR Kiosk.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR3.4.1 The user must be able to capture a query and add an attachment. The system response time must be less than 10 seconds when an attachment of any size is added to a query. **BR3.4.2** An Agent must be able to select an employee from a list of employees, and the system must prepopulate employee details onto a query form.		
BR3.5	**Logging an uncategorised query** **BR3.5.1** The system must automatically log a query received via email. **BR3.5.2** The agents must be able to categorise a query submitted via email by assigning a category, capture missing details and be able to change the category for a query.		
BR3.6	**Query acknowledgement message** **BR3.6.1** The system must automatically send an acknowledgement message to the employee's email address or SMS when a query is received. This must depend on the employee's preferred contact method.		
BR3.7	**Track Service Level Agreement (SLA)** **BR3.7.1** A query must have a status linked to a specific SLA. For example, when a query is logged, its status should		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	be ‘received’ and can be in that status for a set number of hours or days. **BR3.7.2** The system must track the SLAs based on query status and query owner and/or the department a query is escalated to. **BR3.7.3** The system must indicate a query about breaching the SLA by highlighting it in amber and, if violated, in red. **BR3.7.4** The system must send an email notification to the manager of the specific department when an SLA for a particular query is breached.		
BR3.8	**View a query** **BR3.8.1** The system must have a consolidated list of queries. **BR3.8.2** The system must have a search function where a user can search through various variables.		
BR3.9	**Assign a query** **BR3.9.1** The supervisor must be able to assign a query to an agent as a query owner and change the status to the investigation. The system must add the assigned query to the agent’s list of tasks.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR3.9.2 The agent must be able to assign a query to him/herself. The query must be added to an agent's list of tasks. **BR3.9.3** An agent must be able to add comments and send emails or SMS to employees directly from a query. The activities must be added to the query history.		
BR3.10	**Escalate a query** **BR3.10.1** An agent must be able to escalate a query to another department within HR by assigning a department's name and a respective person to address a query. **BR3.10.2** The system must automatically notify an employee (query logger) when a query is escalated to a specific department via email or SMS.		
BR3.11	**Resolve a query** **BR3.11.1** An agent must be able to flag an urgent query that requires immediate attention. **BR3.11.2** The system must pause/stop tracking the SLA against an agent if a query is escalated to another department and must resume tracking an agent when a query is sent back to an agent.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR3.11.5 The system must send an email notification to an agent (query owner) when a query is returned to an agent. **BR3.11.7** The system must be able to receive a response to an email that is related to a query. **BR3.11.8** The agents must be the only users allowed to close a query. **BR3.11.9** The system must notify an employee when a query is closed.		
BR3.12	**Email to third parties** **BR3.12.1** An agent must be able to generate and send a query to an external third party. There must be a capability to attach the original query to the email.		
BR3.13	**Reports** **BR3.13.1** The system must have a real-time dashboard showing queries with or without query owners. **BR3.13.2** The system must produce a daily report displaying queries that do not have query owners. **BR3.13.3** The system must produce a daily report displaying queries that violate SLAs. **BR3.13.4** The system must have a Pie chart displaying overall query statuses for a specific period.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR3.13.5 The system must have a graph displaying the number of queries per type (category). **BR3.13.6** The system must produce a report indicating the query turnaround time. **BR3.13.7** The system must produce a daily query management report showing all query categories, query owners, status, department escalated to, and date assigned. **BR3.13.8** The system must provide business intelligence (BI) features to accurately monitor and measure customer service factors. The system must give ACSA insight into customer satisfaction for better customer retention. BI will also allow ACSA to monitor new customer acquisitions to gain excellent client references.		

Table 5:Employee Query Management Requirements

Corporate Services: Stakeholder Relations Management:

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

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
BR4.1	**External stakeholder profiling** **BR4.1.1** 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. **BR4.1.1.1** 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. **BR4.1.1.2** Data collection should be aligned with the Protection of Personal Information Act (POPIA). **BR4.1.2** The system must be able to suggest names of external stakeholders while the user is typing based on stakeholder names stored on the database.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR4.1.3 The system must allow a user to add a new stakeholder with a name and surname similar to an existing stakeholder. **BR4.1.3.1** The system must add an organisation name to the saved stakeholder's name to make it unique if a stakeholder already has a similar name.		
BR4.2	**Stakeholder Owner (ACSA Executive) profile** **BR4.2.1** The stakeholder relations coordinators must be able to add, edit, and delete stakeholder owner profiles. **BR4.2.2** The system must integrate with Active Directory to retrieve the stakeholder owner's name, surname, position held, division, office number, email address and mobile number.		
BR4.3	The system must have user contact groups and automatically add the external stakeholder to email, SMS and/or mail (letters) group(s). **BR4.3.1** The group for SMS must consist of the stakeholder name, mobile number, and the company represented.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR4.3.2 The email and mail (letters) group must consist of the stakeholder's name, email address, company represented, and position held.		
BR4.4	There must be a capability to search for a stakeholder profile by name, surname, or company.		
BR4.5	**View a profile** **BR4.5.1** The system must have a screen showing a list of all stakeholders that have been created. **BR4.5.2** 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.		
BR4.6	**Capture a Corporate Project** **BR4.6.1** 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.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR4.6.2 The users must be able to update the fields captured for a project.		
BR4.7	The system must generate a unique identifier for the engagement plan and each engagement objective on the plan.		
BR4.8	**Engagement plan** **BR4.8.1** 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. **BR4.8.2** The coordinator must capture a master / consolidated plan for the organisation with targets for engaging stakeholders.		
BR4.9	**Executive engagement plan for a Stakeholder Owner (Executive**) **BR4.9.1** 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. **BR4.9.2** The engagement plan should consist of the following minimum fields: external stakeholder		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	name, ACSA/stakeholder issues, Group KPI engagement approach, divisional strategic objectives, relationship status, frequency, planned date, priority level and stakeholder commercial value. **BR4.9.3** The system must generate and send a workflow notification to a stakeholder owner (executive) to accept or reject the engagement plan.		
BR4.10	**Engagement Plan for a Corporate Project** **BR4.10.1** The engagement plan must consist of external stakeholder(s), stakeholder needs and expectations, engagement approach, strategic divisional objective, planned engagement date, the status of the planned engagement, and stakeholder owner. **BR4.10.2** The engagement plan must be valid for the duration of a project. **BR4.10.3** The system must allow a stakeholder owner that is added to an approved project's engagement		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	plan to have access to capture feedback for an engagement. **BR4.10.5** The system must generate and send a workflow notification to a project owner to accept or reject a plan.		
BR4.11	The system must notify the stakeholder relations coordinator that created a plan when rejected or approved.		
BR4.12	**Engagement objectives** 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 statuses: • Pending after being added. • Scheduled when there is a scheduled engagement. • Pending feedback when feedback is not captured. • Completed when feedback is added.		
BR4.13	The system must be able to display the stakeholder owners (executives) that have external stakeholder (s) linked to their pending planned engagements.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	The system must be able to flag outstanding engagements at the end of each quarter in line with commitments in the uploaded engagement plan. The system must have the capability to upload files which can then auto-upload issues against stakeholders already on the system.		
BR4.14	The system must monitor and track the executive, project-specific, and master plans performance; and display the following: **BR4.14.1** Actual against target total number of engagements per week, month, quarter, and year. **BR4.14.2** Actual against projected stakeholder value adds. **BR4.14.3** Average status of external stakeholder relationships. **BR4.14.4** Stakeholder level of influence (based on the value of the stakeholder profile). **BR4.14.5 G**raphical comparison of planned engagement VS completed engagement. **BR4.14.6** Key themes of engagements done to ensure the		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	business is engaging in line with divisional objectives in the plan		
BR4.15	**BR4.15.1** 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. **BR4.15.1** The system must notify the stakeholder owner (executive) of changes made to the approved plan.		
BR4.16	**Schedule an engagement that is linked to Plan.** **BR4.16.1** The users must be able to schedule an engagement linked to the engagement objective on the plan. The minimum details to be captured are as follows: • To field defaulting to external stakeholders. • Meeting organizer(s) defaulting to stakeholder owners. • Engagement method. • Location. • Start time and End time. • Body/content of email. **BR4.16.2** The system must display stakeholder owners that have the		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	external stakeholder linked to their pending engagement objectives. **BR4.16.3** 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 reflect as meeting organisers. **BR4.16.4** The system must link the scheduling function to the Outlook calendar to reflect the diary of Stakeholder Owner(s) and/or internal stakeholders. **BR4.16.5** The users must be able to send an invitation for a scheduled engagement. **BR4.16.6** The system must automatically change the status of the engagement objective to 'scheduled' for all Stakeholder Owner(s) captured as meeting organisers.		
BR4.17	Schedule an ad hoc engagement not linked to a Stakeholder Owner or Project. **BR4.17.1** The system must allow users to schedule an ad hoc		

Requirement ID	Requirement	Can the solution deliver this requirement? Yes	No
	engagement not part of the engagement plan. **BR4.17.2** The user must be able to capture an external stakeholder email address that does not exist (not have a profile created) when scheduling an unplanned engagement.		
BR4.18	The system must be able to receive the response for an engagement invitation from external stakeholders and Stakeholder Owner(s).		
BR4.19	The system must notify the Stakeholder Owner(s) and stakeholder relations coordinators when there is a response to the invitation from an external stakeholder.		
BR4.20	**Engage the external stakeholder.** **BR4.20.1** The users must be able to engage with external stakeholders via Microsoft Teams and/or email directly from the system. **BR4.20.2** 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:		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	• Stakeholder contacted. • Name of the person who contacted the stakeholder. • Date. • Timestamp. • Audio recording. **BR4.20.3** The Stakeholder Owner must have the option to record an engagement session.		
BR4.21	**Capture feedback after an engagement.** **BR4.21.1** The system must have a form for capturing engagement feedback. Each feedback form must be linked to the engagement objective, stakeholder needs and expectations. **BR4.21.2** The system must activate a feedback form when the start time for the engagement commences. **BR4.21.3** The system must notify the Stakeholder Owner(s), and meeting organisers, with a link to capture engagement feedback after the engagement end time; and change the status of an engagement objective to pending feedback. **BR4.21.4** The stakeholder owner must have the option to mark the		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	captured feedback as public or private. There must be an option to add people with access to private feedback. **BR4.21.5** The system must automatically change the status of an engagement objective to completed once the feedback is submitted. **BR4.21.6** The system must automatically generate a 'thank you' email on behalf of the Stakeholder Owner to the external stakeholder engaged when the feedback form is submitted.		
BR4.22	**Action items** **BR4.22.1** 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. **BR4.22.1.1** 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		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	responsible person must be selected from Active Directory. **BR4.22.2** The system must apply relevant SLAs based on the impact assigned to an action. **BR4.22.3** The system must automatically send an email notification with a logged action summary to the Responsible Person and the stakeholder relations coordinator. **BR4.22.4** The system must allow the Responsible Person access to capture comments on an action item and change the action status to resolved. **BR4.22.5** The system must automatically notify the Stakeholder Owner and stakeholder relations coordinator when an action is changed to resolved. **BR4.22.6** The system must only allow the stakeholder relations coordinator and stakeholder owner to close an action. **BR4.22.7** The system must automatically send an escalation email to Stakeholder Owner and Group Manager for Stakeholder		

Requirement ID	Requirement	Can the solution deliver this requirement? Yes	No
	Relations when an action SLA is violated.		
BR4.23	**Bulk emails and letters** **BR4.23.1** The system must allow users to generate letters and send emails. **BR4.23.2** The user must be able to manually create a mailing group to send an email or letter(s). **BR4.23.3** The user must be able to add the group automatically created by the system as the recipient for email or mail. **BR4.23.4** 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. **BR4.23.5** The system must automatically populate the stakeholder's name and surname on the email greeting. **BR4.23.6** The system must send an email from a generic email address. **BR4.23.7** The system must have a function for capturing and printing letters.		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR4.23.7.1 The system must allow users to create letter templates with letterheads for each airport that can be used when generating letters. **BR4.23.7.2** The user must be able to select a specific template to use when capturing the letter's content. **BR4.23.7.3** The user must be able to remove the stakeholders that are not supposed to receive a letter from the automatically created mailing group. **BR4.23.7.4** The system must auto-populate the letter with a stakeholder's company address and have the salutation as the stakeholder's name and surname.		
BR4.24	**Update notifications** An administrator must be able to add, change and remove stakeholder relations coordinators from the notification function.		
BR4.25	**Archiving** **BR4.25.1** The executive, projects and master engagement plan with its corresponding feedback and action plans must be kept for a period of 5 years.		
BR4.26	**Real-time dashboard**		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	BR4.26.1 Display the engagements that are planned and occurred with external stakeholders. **BR4.26.2** Display the consolidated view of ALL Stakeholder Owner's engagement progress. **BR4.26.3** Display the consolidated view of ALL engagements for Corporate Projects.		
BR4.27	**Reports** **BR4.27.1** The Service Provider to enhance the current reports generated from SharePoint. **BR4.27.2** The system must generate the engagement plan progress report for ALL Stakeholder Owners. **BR4.27.3** The system must generate the engagement plan progress report for ALL Corporate Projects. **BR4.27.4** The system must generate the report for action items with their corresponding status for the period. **BR4.27.5** The users must be able to generate reports on an ad hoc basis		

Requirement ID	Requirement	Can the solution deliver this requirement?	
		Yes	No
	and export them to Excel, Word, and PowerPoint.		
BR4.28	**Business Intelligence** The system must provide business intelligence (BI) features to accurately monitor and measure customer service factors. The system must align with the current BI outputs on PowerBI. The system must give ACSA insight into customer satisfaction for better customer retention. BI will also allow ACSA to monitor new customer acquisitions to gain client references in future.		
BR4.29	**Search function** The user must be able to search for data on the system.		

Table 6: Stakeholder Relations Management Requirements

4. Non-Functional Requirements

4.1. Physical locations

4.1.1. Must be available in all nine (9) ACSA sites and corporate office.

4.2. User Volumes

4.2.1. Operations Management (Customer query management)

4.2.1.1. Read-only (50 users).

4.2.1.2. Full functionality (100 users).

4.2.2. Operations Management (Key Account Management)

4.2.2.1. Read-only (10 users).

4.2.2.2. Full functionality (40 users).

4.2.3. HR Shared Services (Employee Query Management)

4.2.3.1. Read-only (25 users).

4.2.3.2. Full functional rights (70 users).

4.2.4. Corporate Services (Stakeholder Relations Management)

4.2.4.1. Read and update (72 users).

4.2.4.2. Full functional rights (8 users).

4.3. Platform performance (Speed & Latency)

4.3.1. The system must respond in less than 5 seconds. The Service Provider is to provide the estimated bandwidth requirements.

4.3.2. The system must respond immediately when attaching a document(s).

4.3.3. The system must handle 1000 minimum queries during peak times.

4.4. Scalability

4.4.1. Must cater for 5% growth per year for additional users.

4.5. Usability

4.5.1. The solution must be web-based.

4.6. Reliability & Availability (Days/Hours)

4.6.1. 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.

4.6.2. The solution must cater for high availability backups and disaster recovery.

4.6.3. The solution must be able to backup daily and have offsite storage for backup storage.

4.6.4. The solution must be able to recover deleted data from backups. The recovery point objective (RPO) must be at most one (1) day.

4.7. Security

4.7.1. The Service Provider must provide ACSA with their security best practices or controls detailing how they secure their solution.

4.7.2. The solution must ensure that data is transmitted in a non-readable format (encrypted) 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 1.2 or up.

4.7.3. 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.

4.7.4. 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.

4.7.5. The solution must also detect anomalies in functionality, user accessibility, traffic flows, and tampering.

4.7.6. Authentication – the solution must uniquely identify users and authenticate them. Administrator accounts must be segregated from normal user accounts.

4.7.7. Authorization – the solution must enable users and/or role-based permissions to be configured to control what solution features and data users can access.

4.7.8. 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.

4.7.9. Assurance – the solution must maintain data integrity and quality. The solution must be a single source of truth regarding data and calculations.

4.7.10. Availability – the solution must be secured to prevent denial of service to ACSA users. It must also provide threat protection.

4.7.11. Asset Protection – the solution must protect ACSA data from being viewed by unauthorised personnel.

4.7.12. The solution must limit access to suspicious visitors and monitor for traffic spikes to prevent overloads like DDoS attacks.

4.7.13. 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.

4.8. 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.

4.8.1. Operations Management (Customer query management)

4.8.1.1. Call Centre and iHelp (face-to-face) agents: create view.

4.8.1.2. Query administrator: create, view, edit.

4.8.1.3. Supervisor: view and edit.

4.8.1.4. Centre of Excellence: View and edit.

4.8.1.5. Airport General Manager for Operations Management: View and edit.

4.8.2. Operations Management (Key Account Management)

4.8.2.1. Business Managers: Create, view, edit.

4.8.2.2. Group executives: View only.

4.8.2.3. Chief Executive Officer: View only.

4.8.2.4. Chief Operations Officer: View only.

4.8.2.5. Centre of excellence: View and edit.

4.8.2.6. Airport General Manager: View only.

4.8.2.7. General Manager: View only.

4.8.2.8. Airport operations manager: View only.

4.8.2.9. Airport General Manager for Operations Management: View and edit.

4.8.3. HR Shared Services (Employee Query Management)

4.8.3.1. Contact Centre agent for the specific Pay point: Create, view, update, and close query.

4.8.3.2. Users from other departments: View and update query.

4.8.3.3. Supervisor: View and update query; generate the report.

4.8.3.4. Manager: view query; generate reports.

4.8.4. Corporate Services (Stakeholder Relations Management)

4.8.4.1. External Stakeholder Relations Coordinators at Corporate: View & edit all airports and corporate executives' masterplans, schedules, feedback, actions, and reports.

4.8.4.2. 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.

4.8.4.3. Group Executives: View all & edit own page view all other executives and airport stakeholder owner engagement plans, feedback, and actions.

4.8.4.4. Airport stakeholder owner: cannot view group executive pages, however, can only view other airport stakeholder owner's pages.

4.9. Integrity

4.9.1. Must be a single source of truth regarding data and calculations where applicable.

4.10. Privacy and data ownership

4.10.1. 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.

4.10.2. All data to remain the property of ACSA.

4.11. Audit Trail

4.11.1. 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.

4.12. Service access

4.12.1. Query management, Key account management and Employee query management functions must be accessible via laptop, desktop, and tablet.

4.12.2. Stakeholder management function must be accessible via laptop, desktop, mobile, or tablet.

4.13. Operational

4.13.1. Business hours are between 8 am and 7 pm. However, system availability must be 24/7.

4.14. Business Continuity

4.14.1. The system must have an alternative way to ensure business continuity in cases where there is an unfortunate downtime event.

4.14.2. Must be able to perform business functions during downtime, and the system must be synchronised with activities that took place when the system was down.

4.14.3. 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.

4.14.4. 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)

4.14.5. 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.

4.14.6. There must be an updated business continuity plan that demonstrates your company's continuity arrangements for operational disruptions.

4.15. Local Support

4.15.1. The solution's first-line support must be based locally (international support can form part of the 2nd and 3rd line support).

4.16. Look and Feel

4.16.1. The solution must be white labelled to align with ACSA's Corporate identity and branding.

4.17. Data Centre

4.17.1. The solution must be hosted in a Tier level 2 or more data centre.

4.17.2. Regulatory and compliance certificates must be provided, e.g., ISO27001.

4.18. Technology Roadmap

4.18.1. The Service Provider to provide a roadmap of their CRM solution.

4.19. Development Environment

4.19.1. The solution must be able to migrate customisations created in a development environment to a production environment.

4.20. Integration

4.20.1. Integration with existing on-premise systems (service provider to inform us about their APIs, extensions and plugins).

4.20.1.1. Web Recall (for accessing call record).

4.20.1.2. CISCO call manager system (identification of a caller's cell phone number and search profile on CRM).

4.20.1.3. Social Media (ACSA social media pages into one platform).

4.20.1.4. Active directory (users' profiles).

4.20.1.5. Outlook (emails and calendar).

4.20.1.6. FIDS (flight information display system).

4.20.1.7. Oracle HR (Employee details).

4.20.1.8. Oracle Finance (Revenue details per stakeholder).

4.20.1.9. HR Kiosk (pay slip queries).

4.20.1.10. SharePoint (website and storage of attachments).

4.20.1.11. Mobile Application

4.20.2. The CRM solution interface must interface with the IBM ESB, i.e., message based.

4.20.3. The data format passed by the interface must use industry standards, e.g., W3C standards such as XML.

4.20.4. The CRM solution must support a two-way data sync, i.e., between the CRM solution and back-end on-premises systems.

5. Required Services from the Bidder

The bidder's proposal must indicate how they will meet the following:

5.1 Solution Implementation

5.1.1 The solution implementation of all business requirements stated under ACSA business requirements (section 3).

5.1.2 Implementation of all non-functional requirements (section 4).

5.2 Quality Assurance

5.2.1 Unit testing, Functional testing, Performance testing and Penetration and Vulnerability testing must be performed to ensure system quality.

5.2.2 Solution must be fit for purpose.

5.2.3 Solution must be delivered in accordance with the specification and service level agreement.

5.2.4 Solution must adhere to timelines for delivery.

5.3 Documentation

The Service Provider must be produced the following project-related documentation during the project implementation:

5.3.1 Project Management deliverables as per ACSA Methodology.

5.3.2 Architectural design as per best practice Architecture Principles.

5.3.3 Functional Specification.

5.3.4 Technical Specification.

5.3.5 Quality Assurance Specific Documentation (Test Strategy, Test Plan, Test Cases, Defect Reports and Test Completion Reports for all conducted tests)

5.3.6 Operational Manuals

5.3.7 Training Manuals.

5.4 Training requirement

The bidder is expected to conduct training for the following user groups.

5.4.1 Administrators, Technical, IT Help Desk and End User training across all nine (9) airport sites and Corporate office.

5.5 Support and Maintenance Services

The support and maintenance requirements are outlined in Annexure A

SUPPORTED BY:

NAME & SURNAME	DESIGNATION	SIGNATURE	DATE
Thabo Mosala	IT Project Manager		
Nkosinathi Ndlovu	Acting Senior Manager: Digital Solutions		
Zakhele Phiri	Technology & Security Architect		
Vishalan Govender	Chief Technology Officer		

APPROVED BY:

NAME & SURNAME	DESIGNATION	SIGNATURE	DATE
Mthokozisi Mncwabe	Chief Information Officer		