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## **EXPRESSION OF INTEREST**

**To tender for the**

**Supply, Development, Implementation & Support of a Customer  
Relationship Management (CRM) System.**

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Ref: GAB/CS/CRM/2020

<b>Project Description</b>	<b>Supply, Development, Implementation &amp; Support of a Customer Relationship Management (CRM) System</b>
<b>Issued By</b>	<b>Gulf African Bank Ltd, Kenya.</b>
<b>Issue Date</b>	<b>28<sup>th</sup> September, 2020</b>
<b>Receipt of EOI</b>	<b>Expression of interest proposals to be received by Friday 2<sup>nd</sup> Oct, 2020, Noon (Kenyan Time)</b>

## **Introduction**

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Gulf African Bank (GAB) is one of Kenya's first fully Shari'ah compliant banks, offering Shari'ah compliant financial solutions to individuals, corporates and other institutions. The Bank has registered good growth since inception and plans to consolidate its position as the best Islamic Bank in Kenya, through structured practice and use of technology in managing and analysing its interactions with its customers with a view to learning how to best cater for the needs of such audiences.

To meet this objective, the Bank continuously seeks to partner with competent solution vendors for the provision of varying goods and services.

To this end, the Bank is soliciting for Expressions of Interest (EOI) from potential and interested qualified vendors for the **Supply, Development, Implementation and Support of a Customer Relationship Management (CRM) system**.

## **The Requirement**

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In seeking to acquire a CRM System, the Bank is keen on a platform that would gather, link and analyze customer demographic and other data, from each specific journey, in order to obtain insights that would influence the engagement process, close the loops, enhance the experience, strengthen the relationships, build loyalty and ultimately increase the product per customer mix and revenues.

At every stage of the customer journey, the Bank is desirous of knowing who its customers are, what they want, what its interactions with them have been in the past, and what they will be in future.

The ultimate goals of acquiring a CRM system by the Bank include, but are not limited to:

- i. Consolidation of customer information
- ii. Obtain better lead management
- iii. Automation of tasks
- iv. Management of workforce
- v. Simplification of the marketing and sales effort/ processes
- vi. Provision of better customer service
- vii. Discovery of new customers and to increase customer revenue
- viii. Cross-selling of products effectively.

In addition, the System is envisaged to fully support the basic customer lifecycle of:

- i. Attracting present and new customers,
- ii. Acquiring new customers,
- iii. Serving the customers, and finally;
- iv. Retaining the customers.

The requirements shall be provided in more details in a Request For Proposal (RFP) document which will be circulated to shortlisted firms upon review/ evaluation of your Eol submissions.

### **Calls For Expression of Interest**

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This Eol is intended to lead to the identification of potential vendors that can demonstrate competence, capacity and experience in the provision of the need in a manner that enables the Bank to meet its objectives.

The identified vendors will be invited for a competitive tendering process from which the vendor to be engaged will be selected.

In expressing interest, potential vendors are required to respond to this call by providing below details:

- i. A brief Company Profile, clearly indicating your principal place of business
- ii. The proposed system name (and a Manufacturer's Authorization Form/Letter from the OEM, in the event of a partnership)
- iii. A brief system catalogue (features and functionalities)
- iv. List of Customer References indicating the deployments done by your company within the last 5 years (detailing the client, physical address, email address and telephone contact)
- v. List of Customer References where your company is currently providing System support & maintenance (detailing the client, physical address, email address and telephone contact)
- vi. Any additional information that will support your interest
- vii. Vendor Declaration certifying the correctness, in all respects, of the information supplied

The specific format for responding is annexed at the end of this document (Annexure I)

### **Sourcing Steps**

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Upon receipt of your Eol proposals, the Bank shall proceed as per below;

- i. Review the submitted Expressions of Interest
- ii. Prequalify a shortlist of vendors to invite for the tender
- iii. Issue of the RFP document to the shortlisted vendors
- iv. Conduct of the tender process (which may include pitches, site visits etc)
- v. Award to successful bidder.

## **Instructions & Notes to Potential Vendors**

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Important instructions and notes for consideration by potential vendors are described hereunder;

- i. Only vendors who meet our minimum requirements will be considered for further discussions.
- ii. **No prices or commercial proposals should be provided with this EOI.**
- iii. Vendor to state if they are submitting their proposal as a joint venture/ consortium or any other joint format.
- iv. All responses should be provided in standard file formats i.e Pdf, Xls, Doc, PPTs.
- v. Any costs associated with the preparation and submission of the response to the Eoi shall be borne by the vendor.
- vi. The Bank reserves the right to ascertain the information and documents submitted in connection with this Eoi.
- vii. The receipt of a response shall not bind the Bank into any contractual agreements with the bidder. Such arrangements shall only come into place once a bidder is successful as evaluated technically and commercially, and an award is issued.
- viii. The Bank reserves, at its sole discretion, the right to select or reject, either in totality or partially, any and or all proposals made in the context of this EOI. Any such decisions made will be final and no correspondence will be engaged into, other than for the purpose of informing the bidders of the outcome of the process.
- ix. The Bank prides itself on its transparency, fairness and integrity and is determined to maintain the highest standard of business ethics. Accordingly, the same philosophy is expected from the vendor(s), its dealings with the Bank as well as business conduct in general. The Bank will view any deviations in this regard as detrimental to the relationship.

## **Submission of Eoi Responses & Timelines**

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Interested bidders should submit their responses to this EOI in soft copy addressed to: [peter.pasaka@gab.co.ke](mailto:peter.pasaka@gab.co.ke) and copied to [phidelis.mwarenge@gab.co.ke](mailto:phidelis.mwarenge@gab.co.ke) not later than **Friday 2<sup>nd</sup> October, 2020 at Noon, Kenyan Time.**

The subject reference on email should read: **'Expression of Interest – CRM System'**

This Eoi is available under 'Procurement Opportunities' on our website: <https://gulfafricanbank.com/>

## **Format of Submissions**

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Refer to the Annexure I on the next page.

**Annexure I**

I	<b>Name of Company</b>			
	If bidding as a Consortium/ Joint Venture, specify the other firms & their addresses			

II	<b>Principal Place of Business</b>			
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III	<b>Company Profile</b>	Attach		
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IV	<b>Proposed CRM System</b>			
	Indicate System/Product Name			
	Provide Product Catalogue (feature & functionality list)	Attach		

V	<b>Experience - Deployments</b>				
	Sites where your company has done CRM deployments in the last 5yrs	<b>Client Name</b>	<b>Country &amp; City</b>	<b>Email</b>	<b>Telephone Contact</b>
	a				
	b				
	c				
	d				
	e				

V	<b>Experience - Support / AMCs</b>				
	Sites where your company currently has AMCs for the proposed CRM system	<b>Client Name</b>	<b>Country &amp; City</b>	<b>Email</b>	<b>Telephone Contact</b>
	a				
	b				
	c				
	d				
	e				

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**VENDOR DECLARATION**

**Declaration**

I / We, the undersigned state and declare that the above information supplied for this EoI is correct and that I / We give **Gulf African Bank Limited** authority to seek any other references concerning my / our company from whatever sources deemed relevant, e.g. Listed References, Office of the Registrar of Companies, Bankers, etc.

Full name

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Signature.....

For and on behalf of M/s

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In the capacity of (Director/Partner?)

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Dated this .....day of .....2020.

Vendor's / Company's Official Rubber Stamp

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