



Canadian Tourism
Commission

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Negotiated Request for Proposal

Name of Competition:	Destination Customer Relationship Management (CRM) Solution
Competition Number:	DC-2017-JC-03
Closing Date and Time:	30 June 2017, 14:00 Pacific Time (PT)
Contracting Authority:	Jeff Chan, Procurement Officer 604-638-8336 procurement@destinationcanada.com

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SECTION A – INTRODUCTION

The Canadian Tourism Commission, doing business as Destination Canada ("DC"), is Canada's national tourism marketing organization. A federal Crown corporation, DC supports the Canadian tourism industry by marketing Canada as a premier four-season tourism destination, and supports the Canadian economy by generating tourism export revenues.

Through collaboration and partnerships with the private sector, the Government of Canada, plus the provinces and territories, DC works with the tourism sector to maintain our competitiveness and position Canada as a destination where travelers can create extraordinary personal experiences.

DC's approach focuses on those global markets where Canada's tourism brand leads and yields the highest return on investment. DC is active in 12 key geographic markets: Brazil, China, India, Japan, Mexico, South Korea, Australia, France, Germany, United Kingdom, United States and Canada.

For further information, please visit <http://www.destinationcanada.com>

A.1 Purpose and Intent

The purpose of this Negotiated Request for Proposal (the "NRFP") is to solicit proposals for a comprehensive destination customer relationship management ("CRM") solution. See Statement of Work (Section C) for detailed requirements.

It is DC's intent to enter into an agreement with the proponent who can best serve the interests of DC. At the final outcome of the NRFP process, the successful proponent ("Contractor") may be required to collaborate with DC's other service providers and partners to ensure that public relations and communications services are consistent with DC's mandate, brand and corporate strategy.

This procurement process is not intended to create and does not create a formal binding bidding process whereby every proponent is deemed to have entered into a "Contract A" with DC. Instead, the process is intended to enable DC to learn what proponents can offer by way of goods or services in response to DC's Statement of Work. Depending on the number and variety of responses, DC will subsequently negotiate with those proposals that best serve its needs, as determined by DC.

By submitting a proposal, a proponent agrees to this negotiated process and agrees that they will not bring a claim against DC with respect to the award of a contract, failure to award a contract or failure to honour a response to this NRFP.

In summary, this NRFP is issued solely for the purpose of obtaining proposals. Neither the issuance of this NRFP nor the submission of a proposal implies any obligation by DC to enter into any agreement. The intent of this NRFP is to identify those vendors capable of meeting DC's requirements and with whom a final agreement may be negotiated.

A.2 Contract Term

DC anticipates entering into negotiations with the selected proponent(s) for up to a three (3) year period, with an option to extend on an annual basis by DC for a total period not to exceed another three (3) years, at DC's sole discretion. DC does not grant exclusivity, guarantee business or make any guarantee of the value or volume of work that may be assigned to the Contractor.

SECTION B – NRFP EVALUATION CRITERIA AND INSTRUCTIONS

B.1 Mandatory Criteria Evaluation

To qualify for evaluation, proposals will first be checked against the mandatory criteria set out in Section D. Proponents failing to satisfy the mandatory criteria evaluation will be provided an opportunity to rectify any deficiencies (“Rectification Period”). Proposals satisfying the mandatory criteria during the Rectification Period will be further evaluated as outlined in Section B.2. All proposals failing to satisfy the mandatory criteria after the Rectification Period will be excluded from further consideration and notified as such. The Rectification Period will begin at the closing of the NRFP, and will end within a time period defined by DC in its sole discretion.

B.2 Desirable Criteria Evaluation

Proposals meeting the mandatory criteria will then be evaluated and scored on the desirable criteria set out below. DC’s evaluation committee may be comprised of DC employees and consultants to DC who are bound by an agreement of confidentiality with respect to the NRFP process. The evaluation committee will be responsible for reviewing and evaluating proposals and making an award recommendation to DC Senior Executive.

All decisions on the degree to which proposals and/or presentations/demonstrations (if applicable) meet the stated criteria and the scores assigned during the evaluations, are at the sole discretion of DC.

B.2.1 Desirable Criteria Questionnaire (Section E) 40%

Proposals will be evaluated based on meeting the above desirable criteria. Proposals that achieve a score of 60% of 40% or higher (the “Threshold”) will be evaluated further based upon, but not limited to Proposed Pricing.

B.2.2 Proposed Pricing (Section F) 40%

Following evaluation of Proposed Pricing, DC may limit further evaluation to a limited number of the top ranked proposals (the “Shortlist”). Only those proposals on the Shortlist will be invited to provide a demonstration.

B.2.3 Demonstration (Section G) 20%

TOTAL 100%

B.2.4 Negotiations

DC intends to conduct concurrent negotiations, as defined in Section H.10 Negotiations, with a limited number of the top ranked proponent(s).

B.3 Proposal Submission, Intentions, and Questions Instructions

B.3.1 Submissions

Proponents should submit their entire proposal via e-mail to the Contracting Authority by the closing date and time (“Closing Time”) of **14:00 hours PT, 30 June 2017**.

Any proposal received after the Closing Time may not be reviewed by DC. The proponent has sole responsibility for the timely submission of their proposal.

Proposals should be in PDF format and should be submitted as per the instructions in B.3.4 below. All proposals received as a result of this NRFP shall become the property of DC. The time stamp of DC's email system shall be the official time for receipt of the proposal.

B.3.2 Questions

Proponents may submit questions via e-mail to the Contracting Authority until 14:00 hours PT, 13 June 2017. Questions submitted after this date and time may not be responded to.

If DC, in its sole discretion, determines that information generated from any question will be of interest to all, a summary of anonymous questions and answers will be made available to all proponents in the form of an amendment. The source of all questions will be kept confidential.

If a proponent believes that disclosure of a question and response would expose a proprietary aspect of its proposal, the proponent may submit the question with an advisory to DC explaining why it should not be included with the posted anonymous questions and answers. If DC concurs with the request, the question will be answered in confidence and will not be posted. If DC does not concur with the request, the proponent will be asked to restate the question, and if this is not possible, the proponent has the option to withdraw the question.

B.3.3 Intentions

Proponents should indicate if they intend to submit a proposal ("Intent to Submit") via e-mail to the Contracting Authority by 14:00 hours PT, 13 June 2017

Please Note: The Intent to Submit is not a mandatory requirement and therefore does not prevent a proponent from submitting by the required closing date and time.

B.3.4 Instructions

All submissions, intentions, and questions are to be e-mailed to procurement@destinationcanada.com and should reference "**NRFP DC-2017-JC-03, Destination Customer Relationship Management Solution - CONFIDENTIAL**" in the e-mail subject line. Include the following with your submission, intentions and questions:

- Company name
- Name and title of contact person
- Phone, mobile phone, fax and e-mail of contact person
- Reference to the corresponding NRFP section(s) if applicable

There is a maximum of eight megabyte ("MB") file size acceptance of any e-mail. Proponents should divide their responses into appropriate sized (smaller than 8 MB) numbered files. In the e-mail the proponent should provide the detail for each section and how many e-mails they will send. Proposals are stored in an electronically secure and restricted environment. Proposals will not be opened until after the Closing Time has passed.

B.4 NRFP Form of Response, Format and Depth

B.4.1 NRFP Form of Response

Proponents should respond to and include in their proposal:

- Appendix 1 – Proponent Information and Acknowledgement Form
- Appendix 2 – Material Circumstances Form
- Appendix 3 – Amendments
- Appendix 4 – Declaration of Sub-Contractor (if applicable)
- Section D – Mandatory Criteria Questionnaire (if applicable)
- Section E – Desirable Criteria Questionnaire
- Section F – Pricing Proposal (separate file)

B.4.2 NRFP Format and Depth

This NRFP sets out DC's requirements, desired options, and additional considerations. Proponents should prepare their proposals providing a straightforward and detailed description of their ability to satisfy the requirements set out in this NRFP. Emphasis in each proposal should be on completeness and clarity of content, and should correspond to the section numbering set out. Proposals that do not clearly address the requested requirements and/or do not reference the applicable section numbers may be refused for evaluation purposes.

References to hyperlinks or links to social media sites (e.g. LinkedIn) may not be considered by DC in the evaluation process and should not be used. Therefore, any information provided for evaluation should be included in your written proposal.

Only material supplied in response to this NRFP and any presentations or demonstrations (if applicable) will be considered and evaluated. Information, proposals or presentations previously supplied to DC and references to any material, information or presentations not included in your proposal response will not be considered. No assumptions should be made that DC has any previous knowledge of the proponents' qualifications other than that supplied pursuant to this NRFP.

B.5 Contractor Performance Management

DC is committed to fostering and supporting strong positive relationships with its Contractors to ensure critical services are maintained and the highest value and corporate wide economic benefits are realized. As such, the Contractor's performance during the term of any agreement may be assessed using key performance measures.

Any Contractor who has demonstrated poor performance during either a current or previous agreement with DC may be considered as an unqualified proponent and their proposal may be rejected. DC reserves the right to exercise this option as is deems proper and/or necessary.

SECTION C – STATEMENT OF WORK

C.1 Background

The Canadian Tourism Commission, a Crown corporation of the Government of Canada, operating as Destination Canada (“DC”), has the mandate to work with the Canadian tourism industry and provincial and territorial governments to promote Canada as a premier tourist destination, grow tourism export revenue for Canada, grow tax revenue, support the creation of jobs and increase the global competitiveness of Canada’s travel and tourism sector. DC’s mandate is also to support Canadian entrepreneurs, many of whom are small and medium businesses, operating within the tourism sector.

As Canada’s national tourism marketing organization, DC markets Canada as a desirable tourist destination in order to advance the economic well-being of Canadians and the priorities of the Government of Canada. DC focuses on actively marketing Canada internationally to both leisure and business travellers. DC’s Business Events Canada (“BEC”) program operates in five markets (the US, UK, France, Germany, and Belgium), generating meetings, conventions and incentive travel opportunities for various private- and public-sector Canadian partners that result in eventual bookings. This provides economic benefits to the destinations themselves and, in the long-term, creates greater awareness of Canada and the brand among meeting planners and influential senior executives and CEOs.

C.2 Objective

DC and BEC require a comprehensive destination customer relationship management (“CRM”) solution in order to meet tourism marketing and business event sales needs.

The key objective of the Destination CRM solution is to offer DC and BEC a combined platform for sales, partner management, marketing, communications, travel media, inventory management forecasting, and destination-specific reporting in one solution.

C.3 Scope of Work

1. The Contractor will provide a Destination CRM solution with the following capabilities and functionalities:
 - a. General Functionality
 - i. Content stored in Canada (if not, please specify data storage location);
 - ii. CIWeb-based system;
 - iii. Software as a Service (“SaaS”) system;
 - iv. Annual system updates; and
 - v. Permission levels by user type.
 - b. Implementation
 - i. Setup and Configuration, assign a dedicated project manager to work closely with DC/BEC’s project manager;
 - ii. Training of DC/BEC super users prior to or the week following the Destination CRM implementation date;
 - iii. Deployment/Go Live Support available via telephone or e-mail inquiry, Monday through Friday from 8 am to 5 pm Pacific Time;
 - iv. Maintenance support; and
 - v. User forum and ongoing webinars.

- c. Other Functions
 - i. Customization capabilities (i.e. capability for DC to add fields);
 - ii. Unlimited fields and customizations;
 - iii. Text boxes and dropdown menus;
 - iv. Customizable displays;
 - v. Annual System updates with little to no interruption and at no additional cost;
 - vi. Print from any screen;
 - vii. Import/export and merge ability (de-duplication) for accounts and contacts in all areas (sales, marketing, partners);
 - viii. Easy access to key functions from mobile devices (mobile site or application);
 - ix. Compatible with most multimedia file formats (.png, .tiff, .jpeg, .swf, .wav, .mp3, .mp4, .mpg, .wmv, and .avi.);
 - x. Separate modules for business areas; and
 - xi. Quick searches of all fields in system.

- d. Sales and Activity Management
 - i. Create and update sales activities (tracing system);
 - ii. Sales activity/trace automation (auto-scheduling of traces based on a set of parameters);
 - iii. Assign activities/tasks/traces to others;
 - iv. Reporting and tracking progress through sales activities;
 - v. Dashboard of activities to manage and track progress for individual sales people; and
 - vi. Microsoft Outlook integration.

- e. Sales Accounts
 - i. Create/update accounts and leads/opportunities in the sales cycle;
 - ii. Filter accounts by type;
 - iii. Relate or affiliate more than one account (partners, third parties);
 - iv. Create/update contacts;
 - v. Allow multiple addresses (physical, billing, shipping address);
 - vi. Link contacts (same contact on multiple accounts);
 - vii. Relate contacts for automatic updates of contact record;
 - viii. Auto tracking of updates on account histories;
 - ix. Import account or contact lists easily (excel files or csv. files, the International Congress and Convention Association ("ICCA") database); and
 - x. Privacy/confidential setting.

- f. Sales Lead/Data Capture
 - i. Create/update leads;
 - ii. Link leads to multiple accounts;
 - iii. Link multiple contacts to a lead or opportunity;
 - iv. Distribute leads by email or extranet through Destination CRM system (Request for Proposal ("RFP"));
 - v. Simultaneously track leads in sales, partner, and third party accounts (if applicable);
 - vi. Track lead status to capture partner responses including posted room blocks;
 - vii. Allow industry partners to respond to leads and monitor conversions in real-time;
 - viii. View attachments easily; and
 - ix. Track expenditures through system to:
 - 1. track which sales account/contact/opportunity received financial assistance; and
 - 2. track financial assistance expenditures.

- g. Other Sales Functions
 - i. Meeting profiles;
 - ii. Send communications and link to account, lead, or contact;
 - iii. Overall tagging or filtering system for sales accounts, contacts, leads, opportunities, etc. for sales prospecting, sales tradeshow, reporting on sales tradeshow, etc.;

- iv. Familiarization tours (“FAM”) or marketplace tags in Destination CRM;
 - v. Pull contacts lists for sales invites;
 - vi. ICCA database import tool; and
 - vii. Custom extranet for meeting planners to review lead responses from partners.
- h. Sales Event Management
- i. Send event invites and manage RSVPs;
 - ii. Export data for name tags and rosters;
 - iii. Communicate changes, ongoing information and follow-up with built in email tools via Destination CRM system;
 - iv. Expenses/In kind tracking specific to events housed under the event in Destination CRM;
 - v. Integration to collect event payments online;
 - vi. Quickly generate itineraries, link to partner and client records, and distribute to partners and clients through the Destination CRM system; and
 - vii. Track all partners visited during FAMs and record in their partner report card/partner account.
- i. Reports
- i. Search database using standard query or advanced search features to find lists, or merge directly to labels, email lists or mass tagging;
 - ii. Report builder (simple to complex reports including charts);
 - iii. Easily exportable charts;
 - iv. Easily exportable reports to .pdf and Excel;
 - v. Standard suite of reports available linked to Destination Marketing Association International (“DMAI”) standards/best practices;
 - vi. Schedule and automate reports in Destination CRM to be automatically emailed via Destination CRM to staff or executive;
 - vii. Email reports;
 - viii. Sales tracking for individual performance measurement;
 - ix. Destination dashboards;
 - x. Forecasting reports (i.e. pacing – events booked this year versus same time period last year);
 - xi. Sales pipeline reports;
 - xii. Track DC’s efforts in the system and report back to partner through a “report card” dashboard or report through Destination CRM or extranet system;
 - xiii. Real time metrics;
 - xiv. Economic impact of sales efforts; and
 - xv. Economic impact calculator integration.
- j. Partner/Customer Integration
- i. RFP and partner tracking data feed out of and into Destination CRM; and
 - ii. Provide industry partners with secure, password protected extranet or login to limited Destination CRM functions through external portal to interact with DC/BEC.
- k. Partner Records
- i. Link multiple partner accounts;
 - ii. Detailed information on partner captured such as amenities, size, meeting spaces available, etc.;
 - iii. Marketing and advertising descriptions promoting a partner's property, products, or services to be used in publications, etc.;
 - iv. Store images and video assets in partner records;
 - v. Social media integration (Facebook, Twitter);
 - vi. Send referrals as they arise, allowing partners to act on leads immediately through Destination CRM system’s extranet/partner site or Destination CRM communication system; and

- vii. Track referrals and business generated for follow ups by DC and BEC.
- I. Marketing and Communications
 - i. Capture travellers' information to target marketing efforts;
 - ii. Linkages to Content Management System ("CMS");
 - iii. Website integration;
 - iv. Work with existing website developer to integrate forms that will push information from and to website;
 - v. Partner data information integration into website;
 - vi. Track website traffic from DC/BEC website to partner website and recorded in the Destination CRM system via the partner record;
 - vii. Client database integration with marketing and communications campaign system (to send invitations, newsletters);
 - viii. E-blast campaigns sent directly from the Destination CRM system or integrated with another email system;
 - ix. E-blast campaign analytics tracked through Destination CRM system;
 - x. Easily create new accounts and records for tracking new projects;
 - xi. Track and report on co-op advertising, and promotions;
 - xii. Communication templates wizard; and
 - xiii. Sales specific templates and forms for communications that pull sales leads data or partner descriptions, images etc. from various areas in Destination CRM system for marketing and day to day sales follow up activities.
- m. Travel Media
 - i. Travel media communication integration;
 - ii. Centralize data for media contacts;
 - iii. Maintain a library of logos, standard copy (boilerplates, fact sheets) and other assets;
 - iv. Easily distribute press kits and news releases;
 - v. Maintain a listing of media coverage/articles written under media contacts, partner contacts and publication records;
 - vi. Track media coverage for reporting to industry partners and boards;
 - vii. Manage/maintain media contacts;
 - viii. Manage/maintain publications and media outlet "account" records;
 - ix. Maintain detailed activities/notes on each media contact;
 - x. Add/update leads for media proactive story pitching and follow up;
 - xi. Send out media releases and media advisories via Destination CRM system;
 - xii. Track earned media articles and assigned media value; and
 - xiii. Setup itineraries for media host trips and keep track of particulars.
- n. Inventory Management
 - i. Track materials (kits, displays, marketing assets inventory) levels in real time;
 - ii. Manage requests for publications, meeting planner kits and other collateral;
 - iii. Track and report on inventory from multiple locations and sources;
 - iv. Export data for shipping labels and other fulfilment needs;
 - v. Place and complete orders by various departments and link them to the business area (sales, marketing, media) and the account, contact, lead etc.; and
 - vi. Indicate any other additional Destination CRM functions relevant to DC and BEC.
- o. Business Event Sales;
 - i. Management of day to day sales activity;
 - ii. Sales lead and RFP process and data capture system; and
 - iii. Track progress through tracing system.
- p. Reporting and Forecasting;
 - i. Sales tracking for individual performance measurement;
 - ii. Forecasting tools, benchmarking, dashboards, and business event sales reporting; and

- iii. Reporting mechanism on the value of DC and BEC's efforts.
- q. Partner/Customer Integration.
 - i. Destination CRM system integration with CMS; and
 - ii. Track DC's efforts in the system and report back to partner.
- 2. The Destination CRM solution must also:
 - a. Be a cloud based Destination CRM or web based Destination CRM that requires only an internet connection with no additional application download, therefore depending only on the internet connection;
 - b. Be a Destination CRM company that strives to align with destination marketing standards by making continuous upgrades and improvements to the Destination CRM at no additional cost; Be accessible through a mobile site;
 - c. Have user-friendly navigation;
 - d. Allow for easy customization of fields by internal staff members;
 - e. Filter account types based upon "business area" (marketing or sales) to ensure records are contained for specific business users and duplicates do not exist; and
 - f. Be a cost effective solution, including initial investment and ongoing maintenance costs.

The Contractor must import/transfer data from DC's current CRM to the Contractor's Destination CRM solution. The Contractor will provide technical and development support.

C.4 Deliverables and Schedule

It is expected that implementation of the Destination CRM will include a fully functioning Destination CRM, user training, on-going support, super user training and operating/user manuals.

C.5 Contractor Responsibilities

The Contractor will be responsible for ensuring the following:

- Transparent migration to the new Destination CRM environment;
- All items, services, and features as set out in Section C.3 Scope of Work are delivered as per an agreed upon service level agreement ("SLA"); and
- All support inquiries are resolved in a timely manner, as defined in an agreed upon SLA.

C.6 Reporting and Communication

The Contractor will work under the leadership of DC/BEC and provide reporting on an annual basis, or as needed, including but not limited to performance monitoring reports that measure DC/BEC feature usage rates.

SECTION D – MANDATORY CRITERIA QUESTIONNAIRE

Full compliance with mandatory criteria is required in order for proposals to be further evaluated.

D.1 Mandatory Criteria

D.1.1 The Destination CRM must be a Cloud Based Solution that does not require any additional application download. Are you able to comply with this requirement?

Yes No

D.1.2 The Destination CRM must be accessible via mobile platforms. Are you able to comply with this requirement?

Yes No

D.1.3 The Destination CRM must allow users to customize fields. Are you able to comply with this requirement?

Yes No

D.1.4 The Destination CRM must provide the ability to filter account types based upon “business area” (marketing, sales, partnerships) to ensure records are contained for specific business users and duplicates do not exist. Are you able to comply with this requirement?

Yes No

D.1.5 The Destination CRM must align services and upgrades to industry standards such as those set by “Destination Marketing Association International (“DMAI”) or similar associations. Are you able to comply with this requirement?

Yes No

D.1.6 The Destination CRM must provide American Institute of Certified Public Accountants’ (“AICPA”) Service Organization Control (“SOC”) SOC 1 and SOC 2 reports or equivalent 3rd party audited reports on an annual basis. Are you able to comply with this requirement?

Yes No

SECTION E – DESIRABLE CRITERIA QUESTIONNAIRE

Proponents should respond to the questions below clearly and concisely. If the proponent is attaching documents as part of their response to a specific question, the proponent should reference the attachments in their response.

E.1 Business / Technical Requirements

E.1.1 Please provide your Company Profile – including structure, length of time in business and experience in Destination CRM development and management. What sets your Destination CRM offering apart from all other Destination CRMs on the market and why is your solution the best fit for DC?

Maximum marks available for this question: 10
Please limit response to no more than one (1) page at 12pt font.

E.1.2 Please describe your Destination CRM solution:

- a. Describe technology, including:
 - i. Where and how data and content is stored (i.e. is content stored in Canada?);
 - ii. Annual system updates;
 - iii. Ability to restrict access by permission levels/user types;
 - iv. Technical support (response time, after-hours policy, etc.);
 - v. Maintenance support;
 - vi. Security features (prevention against breaches);
 - vii. Disaster recovery; and
 - viii. Speed of concurrent use by multiple users.

Maximum marks available for this question: 10
Please limit response to no more than seven (7) pages at 12pt font.

E.1.3 Please describe your Destination CRM implementation approach.

- a. Provide a brief description of your experience and approach to implementing Destination CRMs for clients. Be sure to include the following:
 - i. Setup and Configuration;
 - ii. Deployment/Go-Live Support;
 - iii. User forum and ongoing webinars; and
 - iv. Maintenance support.
- b. Describe proposed Destination CRM discovery and development methodology for DC.
 - i. Specifically, how will you work with DC's different business units to understand and address business needs?
- c. Describe your process for data import/transfer from DC's current CRM to your Destination CRM.
- d. Describe your process and criteria for testing your Destination CRM solution.
- e. Describe training available for staff.
- f. Provide a detailed timeline including the stages and deliverables of this project (i.e. Go-Live date, data transfer/import, etc.).

Maximum marks available for this question: 10
Please limit response to no more than 10 pages at 12pt font.

E.1.4 Identify whether your proposed Destination CRM solution has the following functionalities and capabilities by indicating “Yes” or “No” in table E.1.4.1 General Functionality below. Please provide evidence of how your solution meets the requirements and reference the proposal page where further information can be found. If you have indicated “No” to any of the functionalities, please explain how your solution may be able to meet DC’s key requirements.

Maximum marks available for this question: 70 + 2 bonus marks. Explanations are not to exceed 100 words per functionality.

TABLE E.1.4.1 GENERAL FUNCTIONALITY

Functionality/Requirements – as set out in Statement of Work (Section C)	Yes / No	% / Marks	Reference Proposal Page
GENERAL FUNCTIONALITY		2.5	
Content stored in Canada (If no, please specify data storage location)			
Cloud/Web-based system			
Software as a Service (SaaS) system			
Annual system updates			
Permission levels by user type			
OTHER FUNCTIONS		2.5	
Customization capabilities (i.e. Capability of DC to add fields)			
Unlimited fields and customizations			
Text boxes and dropdowns			
Customizable displays			
Annual system updates with little to no interruption and at no additional cost			
Print from any screen			
Import/export and merge ability (deduplication) for accounts and contacts in all areas (sales, marketing, partners, etc.)			
Easy access to key functions from mobile devices (has a mobile site or application)			
Compatible with most multimedia file formats (.png, .tiff, .jpeg, .swf, .wav, .mp3, .mp4, .mpg, .wmv, and .avi.)			
Separate modules for business areas			
Quick searches of all fields in system			
SALES & ACTIVITY MANAGEMENT		5	
Create and update sales activities (tracing system)			
Sales activity/trace automation (auto scheduling of traces based on a set of parameters)			
Assign activities/tasks/traces to others			
Reporting and tracking progress through sales activities			
Dashboard of activities to manage and track progress for individual sales people			
Microsoft Outlook integration			
SALES ACCOUNTS		10	
Create/update accounts and leads/opportunities in the sales cycle			
Filter accounts by type			
Relate or affiliate more than one account (partners, third parties, etc.)			
Create/update contacts			
Multiple addresses available (physical, billing, shipping address)			
Link contacts (same contact on multiple accounts)			

Relate contacts for automatic updates of contact record			
Auto tracking of updates on account histories			
Import account or contact lists easily (excel files or csv. files, the International Congress and Convention Association (“ICCA”) database, etc.)			
SALES LEAD/DATA CAPTURE		5	
Create/update leads			
Link leads to multiple accounts			
Link multiple contacts to a lead or opportunity			
Distribute leads by email or extranet through Destination CRM system (RFPs)			
Simultaneously track leads in sales, partner, and third party accounts (if applicable)			
Track lead status to capture partner responses including posted room blocks			
Allow industry partners to respond to leads and monitor conversions in real-time			
View attachments easily			
Track expenditures through system to a) track which sales account/contact/opportunity received financial assistance b) track financial assistance expenditures			
OTHER SALES FUNCTIONS		5	
Meeting profiles			
Send communications and link to account, lead, or contact			
Overall tagging or filtering system for sales accounts, contacts, leads, opportunities, etc. for sales prospecting, sales tradeshow, reporting on sales tradeshow, etc.			
Familiarization tours (“FAM”) or marketplace tags in Destination CRM			
Pull contacts lists for sales invites			
Other sales integrations available – which ones?			
ICCA database import tool			
Custom extranet for meeting planners to review lead responses from partners			
SALES EVENT MANAGEMENT		5	
Send event invites and manage RSVPs			
Export data for name tags and rosters			
Communicate changes, ongoing information and follow-up with built in email tools via Destination CRM system			
Expenses / In kind tracking specific to events housed under the event in Destination CRM			
Integration to collect event payments online			
Quickly generate itineraries, link to partner and client records, and distribute to partners and clients through the Destination CRM system			
Track all partners visited during FAMs and record in their partner report card/ partner account			
REPORTS		10	
Search database using standard query or advanced search features to find lists, or merge directly to labels, email lists or mass tagging			
Report builder (simple to complex reports including charts)			
Easily exportable charts			
Easily exportable reports to .pdf and Excel			

Standard suite of reports available linked to Destination Marketing Association International (“DMAI”) standards/best practices			
Schedule & automate reports in Destination CRM to be automatically emailed via Destination CRM to staff or executive			
Email reports			
Sales tracking for individual performance measurement			
Destination dashboards			
Forecasting reports (i.e. pacing – events booked this year versus same time period last year)			
Sales pipeline reports			
Track DC’s efforts in the system and report back to partner through a “report card” dashboard or report through Destination CRM or extranet system			
Real time metrics			
Economic impact of sales efforts			
Economic impact calculator integration			
PARTNER/CUSTOMER INTEGRATION		5	
RFP and partner tracking data feed out of and into Destination CRM			
Provide industry partners with secure, password protected extranet or login to limited Destination CRM functions through external portal to interact with DC/BEC			
PARTNER RECORDS		5	
Link multiple partner accounts			
Detailed information on partner captured such as amenities, size, meeting spaces available, etc.			
Marketing and advertising descriptions promoting a partner's property, products, or services to be used in publications, etc.			
Store images and video assets in partner records			
Social media integration (Facebook, Twitter)			
Send referrals as they arise, allowing partners to act on leads immediately through Destination CRM system’s extranet/partner site or CRM communication system			
Track referrals and business generated for follow ups by DC and BEC			
MARKETING & COMMUNICATIONS		10	
Capture travellers’ information to target marketing efforts			
Linkages to CMS			
Website integration			
Work with existing website developer to integrate forms that will push information from and to website			
Partner data information integration into website			
Track website traffic from DC/BEC website to partner website and recorded in the Destination CRM system via the partner record			
Client database integration with marketing and communications campaign system (to send invitations, newsletters, etc.)			
E-blast campaigns sent directly via the Destination CRM system or integrated with another email system			
E-blast campaign analytics tracked through Destination CRM system			
Easily create new accounts and records for tracking new projects			
Track and report on co-op advertising, and promotions			
Communication templates wizard available			
Sales specific templates and forms for communications that pull sales leads data or partner descriptions, images etc. from various			

areas in Destination CRM system for marketing and day to day sales follow up activities			
TRAVEL MEDIA		2.5	
Travel media communication integration			
Centralize data for media contacts			
Maintain a library of logos, standard copy (boilerplates, fact sheets, etc.) and other assets			
Easily distribute press kits and news releases			
Maintain a listing of media coverage/articles written under media contacts, partner contacts and publication records			
Track media coverage for reporting to industry partners and boards			
Manage/maintain media contacts			
Manage/maintain publications and media outlet "account" records			
Maintain detailed activities/notes on each media contact			
Add/update leads for media proactive story pitching and follow up			
Send out media releases and media advisories via Destination CRM system			
Track earned media articles and assigned media value			
Setup itineraries for media host trips and keep track of particulars			
INVENTORY MANAGEMENT		2.5	
Track materials (kits, displays, marketing assets inventory, etc.) levels in real time			
Manage requests for publications, meeting planner kits and other collateral			
Track and report on inventory from multiple locations and sources			
Export data for shipping labels and other fulfilment needs			
Place and complete orders by various departments and link them to the business area (sales, marketing, media) and the account, contact, lead etc.			
Indicate any other additional Destination CRM functions relevant to DC and BEC:		2	

SECTION F – PRICING

Proponents should submit their pricing proposal in a separate file from the rest of their response. In the pricing submission, reference the NRFP# and name along with company information.

DC is constrained by a limited budget; therefore proponents are encouraged to present a best value for cost when submitting all pricing requests, while taking into consideration all of the requirements in this NRFP and as demonstrated through their response.

When evaluating proposed pricing, DC may consider the total cost of ownership (TCO) associated with the product or service over its lifetime including, but not limited to, acquisition cost, staffing resources, training, installation, support, maintenance, transportation and logistics, operating costs, and disposal costs. This may also include transition, migration or integration costs which DC would be expected to pay. There should be no hidden costs which DC discovers at the end of the term.

DC does not make a commitment or guarantee of any dollar value or volume of business for any proponent.

F.1 Proposed Pricing Detail

Provide the following

- a. Costing structure (such as cost per license/per user or Destination CRM software model license; monthly or annual cost);
- b. Development and design rates/fees;
- c. Annual fees;
- d. Technical support and maintenance rates/fees;
- e. Any other subcontractors, licenses, software acquisition, vendors, or hosting costs required; and
- f. Any other fees.

All prices should be quoted in **Canadian** dollars, excluding taxes.

F.2 Payment Discounts

DC prefers a Net 30 payment term and may consider accelerating payment based on early payment discounts.

F.2.1 Indicate your payment terms, and explain any early payment discounts available to DC.

F.3 Pricing Strategies

DC may be open to other pricing strategies, incentives, volume discounts or other offerings that would benefit DC. DC, at its sole discretion, may or may not review or consider any such offerings that are proposed.

F.3.1 Please indicate any other pricing strategies that your company may be willing to discuss with DC.

SECTION G – PRESENTATION / DEMONSTRATION REQUIREMENTS

G.1 Presentations / Demonstrations Requirements

DC will require proponents, who have made the Shortlist, to give a demonstration of their proposed Destination CRM solution. The demonstration will be limited in scope to the content of the NRFP and subsequent proposal, and present an opportunity to verify the proponent's capabilities in support of DC's mandate and strategic objectives.

Demonstrations will take place at:

800 – 1045 Howe Street,
Vancouver, BC, V6Z 2A9

Or

Via videoconference

All costs associated with the demonstration will be the responsibility of the proponent.

SECTION H – NRFP PROCESS AND TERMS

H.1 NRFP Process Schedule

The schedule for the proponent selection process is as follows:

Intent to Submit (*)	13 June 2017 14:00 hours PT
Deadline for Questions	13 June 2017 14:00 hours PT
Closing Date and Time	30 June 2017 14:00 hours PT
Presentations of Shortlisted proponents	Week of 17 July 2017
Notification: DC will endeavour to notify all successful and unsuccessful proponents of its selection by approximately:	21 August 2017
Timeframe for Negotiations	10 days following notification by DC

Note: The schedule is subject to change at DC's sole discretion.

(*) Please note the intent to submit is not a disqualifying criterion. If you miss the above date, you can still submit your proposal within the closing date.

H.2 Interpretation of the NRFP

If a proponent is in doubt as to the intended meaning of any part of this NRFP or finds errors, omissions, discrepancies or ambiguities, questions may be submitted and, if deemed necessary by DC, an amendment to the NRFP may be issued.

It is the proponent's responsibility to understand all aspects of the NRFP requirements. Should any details necessary for a clear and comprehensive understanding be required, it is the proponent's responsibility to obtain clarification before submitting a proposal.

H.3 Inquiries and Communication

No individual other than the designated Contracting Authority identified on the NRFP cover is authorized by DC to comment on any portion of this NRFP or the requirements described in this NRFP. DC will not be bound by, and the proponent agrees not to rely upon, any information given or statements made by persons other than the designated DC Contracting Authority.

Making inquiries to an unauthorized person or any attempt to influence the outcome of this process by contacting DC employees (other than the Contracting Authority), the Board of Directors or government officials will result in immediate disqualification and may result in exclusion from future competitions.

H.4 Accuracy of Information

While the information set out, or referred to, in this NRFP has been prepared and included in good faith, DC does not give any representation or warranty whatsoever that it is all-inclusive or that it is free of error. Some items may change at any time due to business circumstances.

H.5 Amendments

Information, instructions, modifications, and/or questions and answers may be incorporated by DC in an amendment to the NRFP. If this NRFP was posted on the Government of Canada BuyandSell.gc.ca website ("BuyandSell"), DC may post amendments to BuyandSell, provide to all proponents who received an invitation, or provide to all proponents who submitted an Intent to Submit a proposal.

It is the proponent's responsibility to regularly review www.buyandsell.gc.ca for amendments to the NRFP that DC in its discretion may post prior to Closing Time. Such amendments may contain important information, including significant changes to this NRFP. Proponents are responsible for reviewing all amendments and confirm that all amendments issued have been read and included in the Proponent's response (see Appendix 3).

H.6 Modification and Withdrawal

Modifications to, or withdrawals of, a submitted NRFP will be accepted by DC by e-mail notice provided that such e-mail is received by DC before the Closing Time. Modifications or additional information received after the Closing Time will not be accepted except upon invitation and request from the Contracting Authority.

H.7 Period of Validity

Proposals must remain open for acceptance for a period of not less than one hundred and twenty (120) days from the Closing Time.

H.8 Proposal Expenses

All costs, including travel, incurred by the proponent in the preparation of its proposal, participation in this NRFP, presentations, demonstrations, or the negotiation of any resulting contract, will be the sole responsibility of the proponent and will not be reimbursed by DC, unless otherwise indicated. All such costs are taken at the sole risk of the proponent. By participating in this NRFP, the proponent agrees to absolve DC of any responsibility for the same.

H.9 Language

Proposals may be submitted in either French or English. The working language for the NRFP process and subsequent contract will be English.

H.10 Negotiations

DC reserves the right to negotiate contract scope and terms with the top-ranked proponent(s) whose expertise, experience, vision and reputation are judged to best serve the interests of DC, hereafter the "Preferred Proponent(s)". Proponents are cautioned not to assume that the lowest priced proposal will result in a contract award.

DC will enter into discussions and negotiations with the Preferred Proponent(s) to reach agreement on the final terms of the Agreement. Negotiations may include requests by DC for supplementary information from the proponent to verify, clarify or supplement the information provided in its proposal or confirm the conclusions reached in the evaluation and may include requests by DC for improved pricing from the proponent.

Concurrent Negotiations: The Preferred Proponent(s), as established under the evaluation, will be invited to enter into contract negotiations with DC. DC intends to conduct negotiations within the Timeframe for Concurrent Negotiations.

At any point in the Timeframe for Concurrent Negotiations, DC may elect to unilaterally terminate one or more negotiation(s). Final selection of one or more Preferred Proponents will be determined following DC's receipt of best and final offers (BAFO). Final selection will be based upon best overall value to DC. There will be no legally binding relationship created with any proponent prior to the execution of a written agreement.

H.11 Contract Award

If a contract is subsequently negotiated and awarded to a proponent as a result of this NRFP process, the contract;

- i. should be negotiated within the Timeframe for Contract Negotiations;
- ii. may include, but not be limited to, the general contract terms contained in Appendix 5; and
- iii. will commence upon signature by the duly authorized representatives of DC and the successful proponent.

H.12 Debriefing

Upon request, and at DC's sole discretion, DC will only provide a debriefing to proponents who met or exceeded the minimum Threshold or Shortlist. All requests must be in writing to DC Contracting Authority and should be made within thirty (30) days of notification of award. The intent of the debriefing information session is to aid the proponent in presenting a stronger proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

H.13 Material Circumstances

A material circumstance means any circumstance or relationship which may lead to an unfair advantage including but not limited to: being associated to or related to a DC employee or Board member of DC; having access to information not available to other proponents; communicating with any unauthorized person with respect to the NRFP process; engaging in any action which constrains or limits the ability of another proponent to submit a proposal for the goods or services herein; providing a gift or benefit to a DC employee or Board member; or engaging in conduct that compromises or could be seen to compromise the integrity of the NRFP process (each a "Material Circumstance").

DC may consider any Material Circumstance (as defined above) as disclosed in a proposal or otherwise, and DC may eliminate a proposal from consideration on the ground that a Material Circumstance gives rise to a conflict of interest that DC considers in its opinion would give rise to unfair advantage in the NRFP process, or would otherwise prejudice the integrity of the NRFP process.

H.14 Proponents Not to Promote Their Interest

Proponents must not make any public comment, respond to questions in a public forum or carry out any activities to publicly promote or advertise their interest in this opportunity.

H.15 Confidentiality

DC recognizes the proprietary nature of information that may be contained in response to this NRFP. Proponents must clearly mark and identify those areas of their proposals which contain confidential information. DC will not use or disclose such confidential information, except for the purposes of evaluating the proposals submitted under this NRFP or as may be required by law, including but not limited to the *Access to Information Act* and the *Privacy Act*.

Proponents shall keep confidential all information received from DC and other information developed for DC in connection with this competition. Proponents shall not use DC's confidential information except as required to develop a proposal and presentation in response to this NRFP.

Except as required by law, DC will not disclose or publish the identity of proponents, nor reveal in any way the substantive information and financial terms contained in any proposal. Only the name of the Contractor will be revealed at the conclusion of the process and only after an agreement has been fully executed by the contracting parties.

H.16 Publicity

Proponents must not refer, expressly or by implication, to DC, or to this competition, in any advertising or other publicity release unless otherwise approved in advance and in writing by the Contracting Authority.

H.17 No Collusion

By submitting a proposal the proponent represents that its proposal has been prepared without collusion or fraud and in fair competition with proposals from other proponents.

H.18 Law

This NRFP process and any subsequent agreement will be governed by the laws of the Province of British Columbia and any dispute will be subject to the jurisdiction of the courts of British Columbia and all applicable federal laws.

H.19 Indemnities

The proponent shall be responsible for and shall indemnify DC from all claims, loss and damages that relate to or arise out of errors, omissions or negligent acts of the proponent, its employees or agents associated with this NRFP process and all costs associated with those claims, loss and damages.

H.20 Rights of Destination Canada

In addition, DC reserves the right, in its sole and absolute discretion, to:

H.20.1 accept any proposal in whole or in part, with the exception of proposals that fail to comply with mandatory criteria, whether or not it is the lowest priced proposal and without prior negotiation;

H.20.2 reject any, all or part of any proposal that:

- i. is incomplete, obscure, irregular or unrealistic;
- ii. fails to meet the objective of the NRFP;
- iii. fails or omits any mandatory information; or
- iv. is non-compliant with any requirement of this request;

H.20.3 not accept any deviations from the stated terms and conditions;

H.20.4 terminate the process at any time and/or re-issue this NRFP at any time;

H.20.5 obtain information from the proponents to seek clarification or to verify any or all information provided by the proponent at any time throughout this NRFP process;

H.20.6 contact references;

H.20.7 enter into negotiations with any proponent who has submitted a compliant proposal, with the goal to establish an agreement acceptable to DC;

H.20.8 incorporate all, or any portion of the Statement of Work, the NRFP, and the successful proponent's proposal into a resulting contract document;

H.20.9 to make an award in whole or in part, including the right to select and contract with more than one proponent to meet the requirements of the NRFP;

H.20.10 not enter into any contract at all with any proponents responding to this NRFP.

SECTION I: LIST OF APPENDICES

APPENDIX	FILE NAME
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1	Proponent Information and Acknowledgement Form
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2	Material Circumstances Disclosure Form
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3	Amendments
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4	Declaration of Sub-Contractors
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5	General Contract Terms
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APPENDIX 1: PROPONENT INFORMATION AND ACKNOWLEDGMENT FORM

1) PROPONENT INFORMATION

- a) Company Information - For identification and information purposes only, provide the following information about your company:

Complete legal company name and address:	
Primary business and length of time business established:	
Number of direct employees:	
Nature of company (i.e. sole proprietorship, corporation, partnership, joint venture):	
Primary contact for the NRFP (name, title, phone number and e-mail):	

- b) References - List three customers with similar requirements to those described in this NRFP who we may contact as references. For each reference include the name of the organization, key contact information (name, title, address, phone, e-mail), and a brief description of the service provided/performed. Proponent agrees that DC may contact any of these references. It is requested that proponents refrain from using DC as a reference in their proposal.

Reference #1:

Client Organization:	
Contact Person:	
Street Address:	
Telephone #:	
Email Address:	
Description of Services:	

Reference #2:

Client Organization:	
Contact Person:	
Street Address:	
Telephone #:	
Email Address:	
Description of Services:	

Reference #3:

Client Organization:	
Contact Person:	
Street Address:	
Telephone #:	
Email Address:	
Description of Services:	

2) PROPONENT ACKNOWLEDGEMENT

The proponent agrees that the information provided in their proposal is accurate and declares that he/she is a duly authorized signing authority with the capacity to commit his/her firm/company to the provisions contained herein. By signing below, the proponent specifically acknowledges that it has read, understood and agrees to the terms of this NRFP.

Executed this _____ day of _____, 2017

Authorized Signature:

Printed Name:

Title/Position:

Company Name:

City:

Address:

Phone Number:

Fax Number:

E-mail Address:

APPENDIX 2: MATERIAL CIRCUMSTANCES DISCLOSURE FORM

MATERIAL CIRCUMSTANCE:

DC requires proponents to disclose all Material Circumstances (as defined in H.13) as an attachment to their proposal.

Check ONE:

No, there are no Material Circumstances to disclose; OR

Yes, there is/are one or more Material Circumstance(s) to disclose and a disclosure statement is attached.

APPENDIX 3: AMENDMENTS

Please confirm that any amendments to this NRFP issued have been read and included in proponent response. List the Amendments included in the response (if applicable).

Amendment No.:	Dated:	# of Pages:
Amendment No.:	Dated:	# of Pages:
Amendment No.:	Dated:	# of Pages:
Amendment No.:	Dated:	# of Pages:

APPENDIX 4: DECLARATION OF SUB-CONTRACTORS

If applicable, the proponent should submit a list of sub-contractors it intends to use in providing the services described in this NRFP by completing the Declaration of Sub-Contractors, for approval by DC. DC reserves the right to withhold approval of such sub-contractors.

The proponent is responsible for supervising and coordinating all projects and/or services that they may delegate to the sub-contractors to ensure the services are provided to DC in a seamless manner.

Indicate the quality control measures and contract resolution processes you have in place for sub-contractors.

The goods and or services in this proposal will be provided solely by the company named in Appendix 1 – Proponent Information and Acknowledgement.

Sub-contractors will be used to provide the goods and/ or services described in this proposal.

Companies called on as Sub-Contractors to collaborate in the execution of the proposed services.

Name:

Contact Person:

Title:

Phone Number:

Fax Number:

E-mail Address:

Address:

City:

Province:

Postal Code:

Description of services provided:

% of services the Sub-Contractor will be providing: _____%

APPENDIX 5: GENERAL CONTRACT TERMS

The following general terms may be required by DC in order to be awarded the Work under this NRFP. Specific language for each of these terms will be negotiated between the parties:

1. Non-exclusive contract;
2. Contract term as provided in the NRFP;
3. The Contractor will designate key personnel assigned to DC file who cannot be changed without the approval of DC;
4. Dedicated time commitments (full time equivalent basis) on a monthly or annual basis to DC work, if applicable;
5. Service levels for typical work (e.g. commitments for timing from planning stages to campaign launch);
6. All intellectual property created by the Contractor will be the property of DC. Contractor will certify that the intellectual property is delivered free from encumbrances and in compliance with all applicable laws;
7. Contractor will undertake to ensure that all campaigns and other activities conducted on behalf of DC in the Contractor's market are done in compliance with applicable laws;
8. Contractor, including their sub-contractors, indemnifies DC for any breach of the contract, in particular claims relating to breach of privacy, third party intellectual property claims, compliance with laws, etc.;
9. Contractor to maintain the appropriate insurance;
10. Fees to be paid on the basis of work delivered;
11. All expenses incurred by the Contractor to be passed through to DC without markup, including media placements;
12. Confidentiality clauses to be included;
13. DC shall be entitled to terminate for convenience upon 30 days written notice and upon payment for any work completed or committed to the date of termination. If DC terminates the contract or a particular work order for breach, then DC is not required to pay for the work;
14. DC approval required prior to Contractor sub-contracting all or part of the work or assigning the contract;
15. Contract to be governed by British Columbia law; and
16. Dispute resolution: senior management intervention followed by binding arbitration to be held in Vancouver, BC in accordance with the rules of the British Columbia International Commercial Arbitration Centre.