

GHANA ECONOMIC TRANSFORMATION PROJECT
TERMS OF REFERENCE (TOR)
CUSTOMER RELATIONSHIP MANAGEMENT (CRM) FOR GIPC

1. Introduction

The World Bank is providing funding support to the Government of Ghana (GOG) for the implementation of the Ghana Economic Transformation Project (GETP)

The overall development objective of the Project is to promote private investments and firm growth in non-resource-based sectors. The Project's objective is to promote and strengthen a growth model conducive to economic transformation to achieve higher rates of investment and productivity growth across the economy, especially in non-resource-based sectors. The Project has four components, as follows:

Component 1 - Enabling investments: This component will focus on improving the enabling business environment, investment attraction capacity and the quality infrastructure support system for companies that want to invest and grow their businesses in Ghana.

Component 2 - Crowding-in investments: Promoting spatial and industrial planning and development: This component will focus on enhancing the Government's programs in investment promotion and spatial development (including Special Economic Zones), thereby addressing the constraint to access quality industrial land in the country.

Component 3 - Accelerating Entrepreneurship and Micro Small and Medium Enterprise (MSME) growth: This component will support entrepreneurship and MSME growth in non-resource-based sectors, addressing specifically the limited development of the MSME and entrepreneurship support ecosystem, including early-stage financing.

Component 4 – Project Management and Evaluation: This component will finance project management activities including fiduciary responsibilities, procurement, safeguards, communication and dissemination, as well as monitoring and evaluation of project implementation and its impact. This will include capacity building for the Project Coordinating Unit (PCU), the Economic Transformation Unit and the Resource Mobilization and Economic Relations Division (RMERD) within the Ministry of Finance (MOF).

2. Background

The Ghana Investment Promotion Centre (GIPC), mandated under the GIPC Act, 2013 (Act 865), is the agency of Government responsible for the encouragement and promotion of investments in Ghana, to provide for the creation of an attractive incentive framework and a transparent, predictable, and facilitating environment for investments in Ghana.

To enhance its operational efficiencies, GIPC as part of its effort to go digital especially after the COVID-19 pandemic, has taken the initiative to install and configure a one-stop-shop tool, a Customer Relationship Management (CRM) software, to handle all core and complimentary activities of the Centre.

The Centre is seeking to contract a vendor to provide and support the implementation of an off-the shelf solution Customer Relationship Management (CRM) system that can be easily customized to suit the business requirements of the Centre. An appendix presents the organizational chart and the solution of the overview of the GIPC CRM assignment.

3. Objectives of the Assignment

The objectives of the assignment are as follows:

- Define the technical, functional, and non-functional requirements of the CRM.
- Support GIPC to procure and implement a modern Customer Relationship Management (“CRM”) system that integrates and consolidates all legacy systems, processes and investor databases into one functional system that can provide the situational awareness required for efficient executive decision-making.
- Provide a central platform that allows for real-time sharing and storage of information across departments allowing for coordination across teams and divisions. This can be brief investor details for validation or other purposes.
- Build a robust workflow-based enterprise application that will help in managing Investor relationships throughout the investment lifecycle.
- Streamline business process and automate activities, facilitate access to data and improve operational efficiency.
- Support GIPC to build capacity to run the CRM system.

4. Scope of Assignment

Pre-CRM Study

Carry out a detailed assessment of the business process underpinning the under listed core functions of GIPC.

Formulate investment promotion policies and plans, promotional incentives and marketing strategies to attract foreign and local investments in advanced technology industries and skill-intensive services which enjoy good export market prospects.

- Initiate and support measures that will enhance the investment climate in Ghana for both Ghanaian and non-Ghanaian enterprises.
- Initiate, organize, and participate in promotional activities such as exhibitions, conferences and seminars for the stimulation of investments, to present Ghana as an ideal investment destination.
- Collects, collate, analyze, and disseminate information about high-potential sectors and subsectors in Ghana, investment opportunities and sources of investment capital, incentives available to investors, investment climate and advise upon request on the availability, choice, or suitability of partners in joint venture projects.
- Register, monitor and keep records of all enterprises in Ghana.
- Register and keep records of all technology transfer agreements of businesses registered in Ghana.
- Identify specific projects and prepare project profiles on investments and joint venture opportunities in Ghana and attract interested investors for participation in those projects.
- Provide aftercare services and identify, track and address investors’ grievances.

- Bring about harmonization in investment policy formulation through coordination of the activities of all other institutions and agencies; and
- Identify the key parameters and gaps the new CRM will address.

Phase 2: Deployment phase

Based on the above assessment, identify, procure and deploy an off-the shelf solution Customer Relationship Management (CRM) system that can be easily customized to achieve the Pre-CRM Study specifications.

Phase 3: Implementation phase

Support GIPC in the Implementation of the new CRM system including

- Installation
- Training
- Customization
- Data Migration
- System Integration

Phase 4: Post Implementation phase

Provide post deployment software support through Service Level Agreement, in addition to further customization and training as needed

NOTE: The appendix shows the CRM Solution Overview.

5. Expected Deliverables

Project Deliverables & Timelines

The Consultant shall submit the following reports to GIPC for review and approval.

A. Inception Report

This report should include at a minimum:

- An executive summary.
- List and brief synopsis of the preliminary data collected.
- Detailed MS Project work plan.
- Preliminary schedule of activities with critical milestones identified.
- Approach and methodology for executing the assignment.
- Results from the Kick-off meeting

B. Monthly Progress Reports

Prepare Monthly Progress Reports to be submitted to GIPC. In general, the report will cover the status to date of the work. At a minimum, it shall include the following elements:

- Executive Summary.
- A narrative description of activities completed during the preceding month.

- A forecast of major activities to be undertaken in the coming month.

C. Final Report

The Vendor shall prepare a comprehensive Final Report describing all activities undertaken during the CRM Project implementation, including a description of methodology and actual vs. baseline results, interventions with other consultants and constructors, and performance indicators.

D. CRM Operational Manual

Prepare a CRM operational manual that will include all useful information for the operation of the CRM by current and future GIPC staff during and following the firm's contract. This will include:

- A description of the operations by staff of the various procedures involved in using, maintaining and updating the CRM (both on the IT side by GIPC's IT department and on the operational side by GIPC's management, monitoring and investor-facing departments)
- A description of the resources needed for each procedures (human resources, budget, systems, tools, templates, etc.)
- A detailed set of Standard Operating Procedures (SOPs) that would synthesize the processes described above into summarized and easy to follow procedure flows

6. Responsibilities of the Client

GIPC shall provide the client with the relevant documents and information as well as access to key officers to facilitate the performance of the assignment. These include but not limited to

- Let's Digitize GIPC document (An assessment report of possible areas for digitization within the GIPC)
- Client Service Charter Draft document
- Standard Operating Procedure (SOP) Draft document
- Doing Business in Ghana document
- Legacy System Audit Findings and Recommendations
- GIPC's Investor Databases Fields and Data points
- Any relevant documents available.

A. Selection Criteria

The vendor will be a consulting firm with the ability to:

Demonstrate experience and ability to implement a CRM system.

Prior successful experience in implementing a CRM solution over the past ten years (experience in implementing CRM at investment promotion agency (IPA) highly desired). CRM system capabilities and ability to meet the technical and functional requirements

Propose cost, fees, and expenses of the system, including implementation, training, and post deployment support.

Pricing should be specific and indicate clearly recurring costs, and perpetual costs.

7. Key Staff: Qualifications

The Lead Personnel must have master's degree in Computer Science or equivalent. With the understated skills and experiences.

- At least 10 years' experience in the design and deployment of CRM Systems (in investment promotion agency (IPA) desired)
- Must have good relationship management skills, communication skills (particularly the ability to communicate with technical and business team members, as well as the client), leadership skills, document management skills and problem-solving skills.
- Must have the ability to deal with cross-functional, cross-cultural, technical, and purchasing requirements and specifications.
- Extensive knowledge in utilizing international good practices, codes and standards in developing modern CRM systems.
- Must be a strategic thinker; capable of understanding the business needs for each project unit and function.

8. Duration of Assignment

The duration of assignment is between six (6) months.

9. Location of the Assignment

The head office of GIPC is located at Vivo Place, No. A1 Rangoon Lane, Cantonments, Accra. The operational area of GIPC is divided into four (4) namely, Head Office, Kumasi Zonal Office, Takoradi Zonal Office, and Tamale Zonal Office.

10. Payment Schedule

The payment schedule will be finalized during negotiations with the successful vendor. For each component, the payment schedule will be structured to provide the following combination of payments:

- a) **Payment on Deliverables (Development of System Requirements/Designs)** - Fixed percentages of total contract price based on submission and performance of identified key deliverables in accordance with specified requirements.
- b) **Stage/Progress Payments** - Percentages of total contract price apportioned over the period of performance for each separate component, with payments made upon completion of the defined project phase. A table of a proposed percentage of payment is shown below.

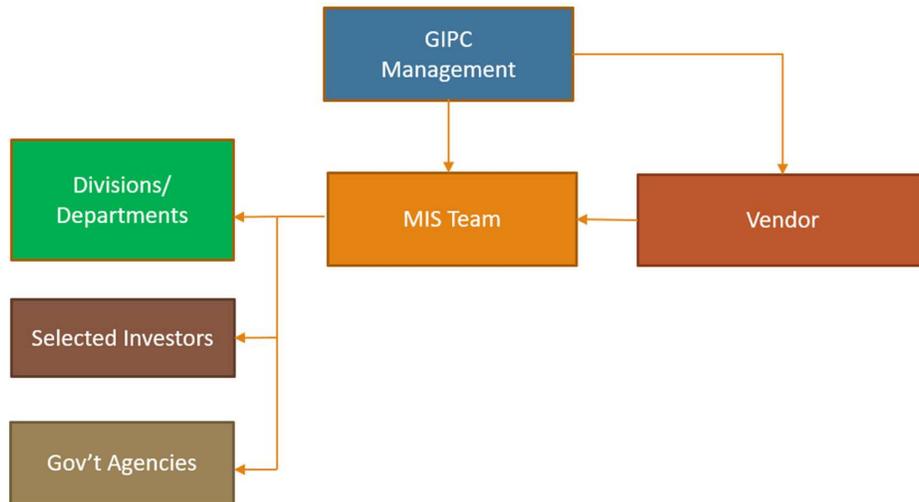
Activity completion & deliverable	Payment (%)
Phase 1: Final Pre-CRM Study Report	20%
Phase 2&3: Final Deployment and Implementation Phase Report	50%
Phase 4: Final Post Implementation support phase Report	30%
Total	100%

11. Reporting

The qualified Consultant/Firm will report to the CEO of GIPC through the Head of research.

Appendix

The chart below presents the reporting or the organizational chart for the GIPC CRM project.



Solution Overview

