Q.No	Question	Response from International IDEA
1	UBW Unit4 Business World is the ERP system in place. It currently stores information on some of the needed items for fundraising, including document management of grant agreements, invoicing and reporting. What is the plan for this system in the future? Is the sync needed between UBW and the CRM?	UBW currently hosts the grant management and reporting part of the resource mobilization cycle. Currently, we need a system that would cover the pre-award part of cycle. We also need a CRM sysem to manage the partnership/donor relations records/communication/engagement tasks. Our current ERP system was implemented in 2019, so we will maintain UBW in the forseeable future. We would need to explore options to integrate and synch the CRM to our current ERP. This synch will not be done during the initial CRM purchase and implementation, but will be executed in a future phase 2. However, in this proposal please confirm if it is technically feasible to integrate ERP and proposed CRM and what is further needed to do so.
2	Where is the current List segmentation happening? Is MailChimp being used for List segmentation and expectation is for the CRM to be synced with Mailchimp to get this data? Please elaborate on this requirement.	Currently all data is independently managed by our offices around the world, using diverse systems including MailChimp and more basic options (Excel sheets). We would need guidance on the best way to organize the data to be uploaded to the system in the implementation phase.
3	How does Event Management activities work within the current system setup. What is Mailchimp currently used for? Apart from Mailchimp are there any other marketing automation tool or solution in place. Is Mailchimp currently being used for Event Management activities? Please elaborate	International IDEA manages events through personal contacts and manual disemination/outreach. We do not have any marketing solutions in place at the moment, and MailChimp is used through decentralized accounts to disseminate information and relevant information to our contacts.
4	Please provide a view on current system landscape and integerations? And the future end-state of the system once the CRM is introduced? What systems will need to be synced with the CRM and what systems will be retired and their functionalities moved the CRM or other systems?	We do not have automated constitutent management systems in place as data is mostly handled manually in separate offices, or users sign up for a newsletter on our website (via Mailchimp). Email lists (e.g. for Board member, advisory groups) are maintained in global Outlook. We would need to integrate Outlook and seek clarification on functionality and how things are recorded in the CRM from exchanges through an integrated Outlook. If possible, we also need to integrate Office and Metashare, which we use as our document management system.
5	There is a requirement on Social media engagement. Please elaborate on this requirement to understand which channels and what kind of data are we planning to share. How is the current social media engagement working? What is expected from the new CRM tool?	International IDEA would like to better connect with its partners and increase its followers and engagement, as well as to improve brand recognition and visibility on social media with a systematic way to review and manage activity. We have accounts on Twitter, Facebook, LinkedIn and Instagram and YouTube. We think there is an opportunity for improved tracking of the active and engaged users and those with a high exposure and following (influencers). We currently use Tweetdeck and respond to inquiries in post as they come in. We would like a CRM system that can help us identify our dedicated partners or subscribers, as well as those who prefer to communicate or may be more receptive to engaging with us on social media. For example, we can target how we share our newsletter and event invitations via social media messaging and inboxes rather than via email. With guidance from the potential provider, we can identify how best to strengthen these relationships, review history of interactions and preferred outreach methods.
6	Where is the current “Online donation and payment process” happening? Is the plan to leverage the new CRM tool to perform these functionalities? We are assuming that this functionality sits outside of the new CRM system (probably an ERP system like UBW) and there is a need for integration to bring the data and information back CRM. Please confirm on this understanding.	There is currently no online donation and payment process in place. It is as yet undecided if the new CRM tool will be utilized in the future for online donations. As indicated previously, our current ERP system hosts the grant management and reporting part of the resource mobilization cycle. All financial transaction are made directly to our bank and registered in the ERP by our finance team. It would be ideal to integrate the new CRM with existing ERP in the future to cover the full fundraising cycle and have a strong repository of the institutional memory from the point of engaging with a potential donors, all the way to the reporting and compliance aspects of the process.
7	What are the source system(s) for the data that should be migrated?	Different sources: Excel sheets, MailChimp, Outlook contacts, mission/meeting reports - We assume that the best option would be that the CRM provider prepares a template for International IDEA to organize the data, and deliver the information in the most convenient way to do the data migration.
8	What objects need to be migrated? (Accounts, Contacts etc)	Contacts, Organizations, Govenments, Donors, Media outlets, service providers, consultants
9	Number of fields per object including number of fields that are related to other objects.	Contact Person Telephone Email Address Position Organization (used to link to the organization/account) Funder (yes/no) Funding Instrument Do not contact option
10	What are the data migration volumes per object?	Between 2000 and 3500 (rough estimate)
11	Data cleaning(ex deduplication) . Will this be done by International IDEA or Fluido?	Done by International IDEA, with guidance from Fluido (Templates)
12	Is there any requirement to migrate documents or emails into the CRM?	Minimum requirements (Perhaps Framework agreements or MoUs with certain donors/partners)
13	**Accounts** What is your defintion of an Account (legal, branch office, partner, etc)? Does this differ between source systems? Do you have any need for an Account Hierarchy? What uniquely identifies an Account?	For us an account refers to an organization/partner that we work with (i.e. Bosch Foundation) - Under this account, we should be able to add contacts, products (projects), secured funding, funding in the pipeline, and all correpondence or enchange between an IDEA Staff Member and the organization/donor, should be automatically registered under the account. All our accounts, at least in the CRM, should have the same level, but it would be ideal if we could differenciate between the types of partners that we have (i.e. funding partner, thematic partner, implementing partner, etc) We should be able to filter accounts per account (organization), field of work, geographic scope and type of partner.
14	**Contacts** What is a contact for you (email, phone, name, etc?) What uniquely identifies an Account? Can one contact be related to more than one Account?	A contact includes a name, a position in an organization, a phone number, an email address, and a physical address or reference (Mandatory fields.) Optional: Social media account We should be able to filter contacts per account (organization), field of work, geographic scope and/or type of partner.