

Request for Offers

Introduction

The Geneva International Centre for Humanitarian Demining (GICHD) is pleased to invite companies to submit a quotation for the provision of the Customer Relationship Management System (CRM) implementation described below as per requirements set out in this request for offers (RFO).

Reference number	RFO/2026/CRM/01
Project number	1011
Posting date	[18. February 2026]
Deadline for submission of the offer	[13 March 2026], [00.00], Geneva Time
Currency	The quotation shall be presented in Swiss Francs (CHF)
Language	The quotation shall be submitted in English
Submit to	h.tejerina@gichd.org and i.rashad@gichd.org

RFO Terms

By participating in this RFO (e.g., by submitting an offer), you agree to the following terms:

- This RFO is not a contractual offer and does not create any obligation on the part of GICHD to award a contract or to accept any offer. GICHD reserves the right to reject any or all offers, to withdraw or amend this RFO at any time, or to cancel the procurement process without providing reasons and without incurring any liability towards the participants.
- GICHD shall not be liable for any costs or expenses incurred by the participants in connection with the preparation or submission of an offer.
- GICHD is under no obligation to provide feedback or explanations regarding the selection or rejection of any offer.
- Evaluation of offers will be at the sole discretion of the GICHD.
- GICHD reserves the right to negotiate the terms of any offer or contract, including price, scope, and timelines, with any participant.
- This RFO and any related process shall be governed by the laws of Switzerland and subject to the exclusive jurisdiction of the courts of Geneva, Switzerland.

Requirements

Specification of the service	<p>1. Setup and Configuration</p> <ul style="list-style-type: none"> • Initial CRM account setup. • Support identification of user/organizational needs • Configuration of required modules in line with organizational needs. • Definition and configuration of user roles, permissions, and team structures. • Support development of implementation and roll out plans • Set up and configure CRM environments, including the production environment for live operations and a testing/sandbox environment for configuration, workflow testing, and staff training if available. • Backup & Disaster Recovery: Backup frequency, retention, geographic redundancy, RTO/RPO, and past data-loss incidents. • Scalability: Ability to support growth in users, data, and transactions. • Availability: SLA uptime guarantee, planned maintenance notifications, monitoring, and incident resolution procedures. <p>2. Data Migration</p> <ul style="list-style-type: none"> • Migration of existing data from spreadsheets into the CRM, including contacts, donors, grants, and historical activities. • Data cleaning and duplication fixing. • Validation of migrated data to ensure completeness and accuracy. <p>3. Contact Management</p> <ul style="list-style-type: none"> • Configuration of contact and organization profiles. • Contact segmentation and categorization. • Automatic identification and moderated merging of duplicate contacts. • History of contacts (worked for company A, moved to company B). • Activity logging and tracking, including: <ul style="list-style-type: none"> ○ Emails ○ Calls ○ Meetings ○ Forms ○ Donations
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	<ul style="list-style-type: none"> • Business Cards Scanning <ul style="list-style-type: none"> ○ The CRM should support scanning of physical business cards and automatically extract contact information from scanned business cards. ○ Extracted information (e.g., first name, last name, company, job title, etc..) should be automatically mapped to corresponding CRM contact fields and allow creation of new contact directly from the scanned card. ○ The CRM should store a digital copy (image or PDF) of the scanned business card within the associated contact or lead record. • Configure GDPR-compliant subscription types and consent management, ensuring that consent source, legal basis, timestamps, and history are recorded and auditable on each contact record, and automatically enforced in all communications. <p>4. Grant Management</p> <ul style="list-style-type: none"> • Centralized Donor & Grant Requirements Management <ul style="list-style-type: none"> ○ Maintain a centralized repository of all donors and grant-related requirements. ○ Allow structured documentation and easy retrieval of compliance obligations. • Configuration of a grant management pipeline with defined stages: <ul style="list-style-type: none"> ○ Identification ○ Application ○ Awarded ○ Reporting • Definition of mandatory grant properties, including: <ul style="list-style-type: none"> ○ Donor institution ○ Grant amount ○ Application and reporting deadlines ○ Reporting frequency • Document management, including file uploads and attachments linked to grants. • Real-time, role-based access to Project Managers, Finance, and other authorized/key users. • Include a centralized, searchable log of all donor communications, linked to respective grants. • Reduce reliance on email by serving as a single source of truth for donor-related information. • Automate the management of reporting and compliance tasks by tracking reporting deadlines and cycles, monitoring restricted countries, managing audit
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	<p>requirements, ensuring adherence to applicable financial rules, and providing configurable reminders and notifications to support timely and accurate compliance</p> <p>5. Marketing Automation</p> <ul style="list-style-type: none"> • Setup of email campaigns and newsletters. • Configuration of forms and landing pages. • GDPR-compliant consent management for marketing communications. • Ensure that all communications interactions (email engagement, form submissions, website activity, and campaign data) are fully integrated with contact records. • Ability to track delivery rate, opening rate, clicked links. • Integration with the GICHD Social media accounts. <p>6. Integrations</p> <ul style="list-style-type: none"> • Integration with the organization's website CMS (TYPO3), including form submissions and data synchronization. • Single Sign-On (SSO) integration using Microsoft 365 authentication (the same credentials used for Teams, Outlook, etc.). • Secure data exchange between systems in compliance with GDPR requirements. • Integration with the GICHD events management system (EventsAir). <p>7. Reporting and Dashboards</p> <ul style="list-style-type: none"> • Setup of CRM dashboards • Configuration of KPIs and analytics, including: <ul style="list-style-type: none"> ◦ Donor engagement ◦ Grant pipeline status ◦ Marketing campaign performance • Ability to export reports in PDF (.pdf) and Excel (.xlsx) formats. <p>8. Training</p> <ul style="list-style-type: none"> • Administrator training and user guide documentation covering: <ul style="list-style-type: none"> ◦ User management ◦ Reporting and dashboards ◦ Data management and GDPR compliance • Key users training and user guide documentation on managing and optimising department-specific CRM workflows (Grants, communications, research and innovations, etc.).
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	8. Key performance metrics <ul style="list-style-type: none"> Percentage of time spent per user managing contact lists is reduced by 25% within 6 months, compared to pre-CRM tools and methods. For the top 5 frequent tasks, shorten average completion time by at least 25% within 6 months, compared to pre-CRM tools and methods. Retrieval of contacts and contacts lists for users is reduced by 25% within 6 months, compared to pre-CRM tools and methods.
Service provider qualifications	Proven experience implementing CRM systems for grants management and non-profit organizations.
Timing	The CRM implementation is expected to be completed by December 2026.
Terms	Suppliers must agree to comply with GICHD's Partner Code of Conduct, the GICHD General Terms and Conditions (subject only to commercial negotiations), and any donor-mandated compliance clauses.
Location	The task is expected to be conducted remotely. Initial coordination meetings in person will be welcomed.

Proposal

The supplier shall provide a coherent, organized and clear proposal in response to the request. The proposal should at least cover the following items:

- Name of company/individual, Address and contact details
- Description of how the requirements set out above will be met by the supplier
- Description of implementation timeline and key milestones
- A brief overview of similar past projects
- At least two references from recent relevant client
- Optional supporting materials: Live demo links
- Proof or registration as an independent legal company
- Applicant's Gender & Diversity Policy
- Applicant's Environmental Policy
- Applicant's Data Protection Policy
- Curriculum Vitae of primary staff assigned to this project
- Pricing: The bidder shall submit a detailed pricing offer that clearly distinguishes between one-time and recurring costs and covers the full scope of work for the CRM implementation. The pricing must include, but not be limited to, CRM software licensing or subscription fees for each proposed module, system configuration and customization, data migration, integration with existing systems, user training and change management, testing and deployment activities, and post-implementation support and maintenance. Any third-party costs shall be clearly identified and presented separately.

**Successful applicants may be contacted to clarify details of their proposal and discuss specific contractual matters following the deadline for submissions.*