

The Hague, 30th June, 2022

**Invitation to Tender for the  
Provision of CRM Implementation Support  
to be supplied to Euclid Network (EN)**

We are inviting submissions to tender **CRM implementation support** to Euclid Network (EN) in the set up /establishment of its new relationship management and engagement tracking platform hosted in **Salesforce**.

By participating in this tender you are indicating your acceptance to be bound by the guidelines set out in this document.

Please direct any questions regarding the tender to **Helen Maynard-Hill**, Head of Communications and Events [helen@euclidnetwork.eu](mailto:helen@euclidnetwork.eu) and **Marcela Neves**, Community Engagement Office, [marcela@euclidnetwork.eu](mailto:marcela@euclidnetwork.eu)

As part of this tender process Euclid Network makes no obligations in any way to:

- (i) pay any vendor for any response; or
- (ii) award the contract with the lowest or any bidder; or
- (iii) include vendors responding to this call, in any future invitation; or
- (iv) any other commitment to vendors whatsoever.

Any proposal received is subject to contract.

## Introduction to Euclid Network (EN)

Euclid Network (EN), the European Social Enterprise Network - is a European umbrella organisation and network for intermediary organisations that support social entrepreneurs and impact-driven leaders. Our 40+ members are based in 24 countries and active in 47 countries and represent over 100.000 organisations throughout Europe and beyond.

EN is a strategic partner of the European Commission (EC), an observer to the United Nations Task Force on Social and Solidarity Economy (UNTFSSSE), member of the World Economic Forum (WEF) Global Alliance for Social Entrepreneurs and strategic partner of the Social Enterprise World Forum (SEWF) and the European Venture Philanthropy Association (EVPA).

EN enhances the field of social entrepreneurship and social finance through knowledge exchange, research, capacity building, networking, influencing policy change, raising awareness, international advocacy and impact-driven programming and partnership building.

EN's activities range from :

- providing networking space and opportunities for member and partners,
- providing support regarding EU/other funding opportunities,
- acting as a pan-European disseminator of information and causes related to the development of social enterprise ecosystems, social entrepreneurship and social innovation;
- participating in European projects in its capacity as disseminator, thought expert and technical advisor;
- Engaging actively with the European Commission, governments and municipalities to support lobbying and policy-making efforts.

EN's team comprises a total of 14 people, including managers, thematic project officers and communications officers. The team is likely to grow in coming months.

## Deliverables

### CRM Implementation & Support

As EN continues to grow in membership and in team members, it is time to transition into an automated and centralised CRM system capable of grouping, filtering and analysing

information on demand, and producing automated reports to better track and monitor our impact.

The objective of this transition is to make better use of our staff time in strategic initiatives, seeking to drive positive change across Europe and neighbouring countries in addition to establishing faster reaction times and increasing efficiency for existing initiatives.

### Key Responsibilities of the contractor

<p>Guide EN team through different software architectures and support in choosing a suitable and sustainable platform.</p> <ul style="list-style-type: none"> <li>- P10 or paid licences?</li> <li>- Different plug-ins and integrations for a <i>beta</i> version</li> </ul>
<p>Provide technical support in the implementation, construction and transfer of data from Excel files to the CRM system.</p>
<p>Provide technical training to the EN team on troubleshooting, best practices and common mistakes.</p>
<p>Onboard larger EN team onto the platform upon completion of <i>beta</i> version. (Basic onboarding)</p>
<p>Provide <i>ad hoc</i> support for the period of <b>12 months</b> from the signing of the contract. Support provided after the expiration of the 1-year period, can be discussed at a later date, under different conditions.</p>

### Immediate CRM Needs - Centralise data

- Create database of contacts (members, expert speakers, partners and more)
- Begin to establish relationships between different contacts
- Track communications between different team members & EN network members (communications log)
- Establish a pipeline of new members/partners and follow-up on these new opportunities in a more automated way.

### Medium to Long-term CRM Needs (to be confirmed)

- Marketing Cloud:
  - Automated communications
  - Marketing & KPIs
    - Campaigns & more

- Impact Measurement & Management tools
- Services Cloud
  - Payment integration software for invoicing and membership fees;
  - Fundraising & Grant management
  - Case management (also linking to pipeline of new members)
- Community Interface
  - Slack or similar communication tool with external (members)
  - Members only interface/portal for exclusive sharing of material/knowledge.

### Preferred Timeline

- July 2022 - launch tender and meet with selected CRM implementation partner
- October 2022 - launch *beta* version in time of Annual General Meeting (Nov)
- December 2022 - Feedback & check in of the platform and plan next steps/phases

### Location

- In place: The Hague
  - Euclid Network (EN) office is located in [Apollo 14](#), Saturnusstraat 14, 3rd floor, 2516AH,
- Online: Zoom

## How to Respond

Please submit your PDF proposal [here](#) by 08 July 2022, 23:59 CEST.

Euclid Network reserves the right to disregard any response submitted after the deadline. Your proposal should be no more than five pages and should include:

- Your proposal - including your understanding of the task and working methods
- A short portfolio of relevant experience
- Your company profile or CV
- Financial proposal

Euclid Network (EN) reserves the right to modify the provisions of this call for tender at any time prior to the scheduled date for submission of offers. Additional scope and requirements may be added. Notification of such changes will be provided to all vendors.

Should you wish to propose a deviation from the specification please ensure that you clearly identify and highlight where appropriate in your response.

By submitting a response, you are committing that you have understanding of the requirements and have sufficiently addressed all aspects of the tender and that you have checked all stated details, such as prices, to be correct and as intended.