

# Request for Proposal (RFP)

## Sub-Grant Opportunity

### SME Digital Growth Tools - CRM Systems

Request for Proposal (RFP) Number	SGA-22-06
Issuance Date	December 07, 2022
Closing Date	December 23, 2022
Closing Date - Timestamp	5:00 PM TRT (UTC+3)
Method of RFP Submission	Submit via email to: <a href="mailto:turkey.tenders@buildingmarkets.org">turkey.tenders@buildingmarkets.org</a>
Subject Line	Price quote for SGA-22-06 SME Digital Growth Tools - CRM Systems
Submission Format	Submit via email to: <a href="mailto:turkey.tenders@buildingmarkets.org">turkey.tenders@buildingmarkets.org</a>
Preferred currency of quotation	United States Dollars (USD)
Tax on Price Quotation	Must be inclusive of VAT and other applicable indirect taxes
Conditions for Release of Payment	All services delivered as per contract scope of work & deliverables
Period of Validity of Quotes starting on the Submission Date	60 Days
Evaluation Criteria	<p>Financial Proposal (30%)            Technical Proposal (70%)</p> <ul style="list-style-type: none"> <li>• Relevance of experience (field work in Building Markets' project cities - İstanbul, Ankara, İzmir, Gaziantep, Adana, Mersin, Şanlıurfa and Hatay regions of Türkiye, collaboration with local government bodies, familiarity with refugee and host community SMEs and entrepreneurs, references) - 30%</li> <li>• Clarity and responsiveness of proposal - 30%</li> <li>• Previous partnership experience with INGOs &amp; international organizations - 10%</li> </ul>
Deadline for submitting questions	December 19, 2022
Informational webinar	<p>Date: December 16, 2022            Time: 2:00 PM TRT (UTC+3), via Zoom (registration <a href="#">link</a>)</p>

## About Us

[Building Markets](#) unleashes the transformational power of small businesses to address pressing social challenges by driving job creation and inclusive growth.

Global challenges we face today—poverty, inequality, climate change, environmental degradation, and injustice—cannot be solved without the involvement of the private sector. Solutions will require transformation in the form of new business models, new innovation, and new technology. This opens up exciting opportunities for small businesses around the world, which represent 90% of businesses and more than 50% of employment worldwide, to play an important role in creating positive social impact by driving job creation and inclusive growth, particularly for the economically vulnerable.

Building Markets develops trusted relationships with entrepreneurs and uses a data-driven approach to strengthen the capacity of small businesses to contribute to local marketplaces through end-to-end services. Our primary model has three pillars:

- **FIND.** We build better market information by verifying small businesses through in-depth surveys and publishing searchable business profiles and research reports.
- **BUILD.** We enhance the commercial and digital capacity of small businesses through training and advisory services, helping them compete in a global marketplace.
- **CONNECT.** We improve market efficiency through tender distribution services, matchmaking services, and events that enable small businesses to access new buyers, customers, and capital.

Utilizing this model in Türkiye since 2018, Building Markets provides a suite of services that support refugee and host community businesses. To date, we have created a [Business Directory](#) of +2,500 SMEs, distributed and published +3,700 opportunities on our [Tenders Directory](#), and [trained](#) or mentored 940 SMEs. [Market research](#) products published by Building Markets create an evidence base to better understand the economic contributions of refugees, and identify opportunities to promote social cohesion through economic development in Türkiye. Businesses participating in Building Markets activities have won over US \$28 million in new business opportunities, which contributes to household incomes and has helped to create or maintain over 3,000 full-time equivalent jobs across Türkiye.

## Background

With the largest refugee population in the world, Türkiye is faced with the challenge of integrating 3.6 million Syrian newcomers into both its society and economy. The impact of the COVID-19 pandemic and resulting economic slowdown have compounded this challenge. It is currently estimated that more than 2 million Syrians in Türkiye are of working age, and 90% of the one million that are employed are working in the informal economy.<sup>12</sup> Ensuring refugees and other vulnerable populations can access reliable, formal employment gives them a path to self-reliance. Once integrated into the labor force, they can leverage their skills and capabilities, earn income, and provide for themselves and their families.

The negative economic impact of COVID-19 is expected to continue to shrink GDP, and Syrian SMEs will likely be disproportionately affected. This endangers the livelihoods of Syrian business owners, their employees, and their families. In an economy with high levels of unemployment (13.9% as of April 2021), particularly among young people (25.6% as of April 2021),<sup>3</sup> social tensions between host communities and refugees can quickly escalate. In a difficult labor market, portions of the Turkish population feel that Syrians are taking jobs away from Turkish people, although there is no evidence supporting this claim. On the contrary, supporting refugee-owned businesses fills a gap in access to formal employment and reduces the informality of the broader Turkish labor market, thereby aligning with Turkish government goals.

The key to creating jobs and sustaining livelihoods in Türkiye is the country's micro, small, and medium-sized enterprises (SMEs), including those owned and managed by refugees. Türkiye offers ample opportunity for business development, as demonstrated by the thousands of companies that Syrian refugees have started in the last decade. Data collected by Building Markets indicates that in 2017 alone, Syrians invested more than \$330 million USD in capital into more than 6,000 new enterprises in the country. On average, these businesses were employing 10 people and reported that most of their employees were previously working in the informal sector, often in illegal, low-wage, and hazardous conditions.<sup>4</sup>

Limited visibility, access to relevant training, information, and capital, as well as partnerships that enable businesses to reach different stages in their lifecycle, hinder the growth, employment potential, and sustainability of Syrian-owned SMEs in Türkiye. For example, business support programs are largely inaccessible to Syrians due to cost, language, or lack of context in addressing challenges specific to refugee-owned firms. Programs also miss the opportunity to promote relationships between refugees and Turkish SMEs, which is crucial to integration, harmonization, and addressing unemployment and informal labor, and the overall growth of Türkiye's private sector. Additionally, while buyers and investors may wish to do business with Syrian-owned enterprises, they report an inability to identify qualified companies, as well as communication difficulties due to the language barrier.

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<sup>1</sup> Leghtas, I. 2019. "Insecure Future: Deportations and Lack of Legal Work for Refugees in Turkey." Refugees International. Available [here](#).

<sup>2</sup> Caro, L. 2020. "Syrian Refugees in the Turkish Labor Market." ILO Office in Türkiye. Available [here](#).

<sup>3</sup> Turkish Statistical Institute (TurkStat). 2021. "Labor Force Statistics, April 2021." Available [here](#).

<sup>4</sup> Building Markets. 2021. "A Syrian Business Hub in Fatih: The Ancient Heart of Istanbul." Available [here](#).

The Building Markets Sustainable Marketplace project works to equip Syrian and refugee-owned SMEs in Türkiye with the knowledge, skills, and relationships they need to access new opportunities, grow and sustain their businesses, and create jobs. There is a great deal of room to scale these outcomes in a way that is meaningful for both refugee and host communities. This includes enabling mutually beneficial business partnerships between Turkish and Syrian entrepreneurs where there is complementary expertise. Turkish businesses sometimes reject the added value of Syrian SME partners, however, they often have access to export markets in the Middle East and North Africa (MENA) region and can more effectively communicate with potential buyers. In addition, local and international NGOs and companies interested in doing business with refugee-led companies often do not possess the relationships or data to include them in their local procurement. In addition to its verification, training, matchmaking, and tender distribution services, Building Markets actively leverages its connections, and deep understanding of and access to the local market to conduct research on Syrian and refugee-owned businesses and their contribution to the Turkish economy.

## Scope of Work:

As part of its sub-grant program under the theme of “Sürdürülebilir Göçmen Girişimciliği - Sustainability in Refugee Entrepreneurship,” Building Markets is seeking partners to expand its service delivery by providing digital growth tools to BM beneficiaries.

Building Markets has an MoU in place with [Workiom](#) and looks for an implementation partner to carry out activities listed below in collaboration with Workiom.

### **Summary:**

Through its capacity building activities on digital transformation over the past years, BM identified some key challenges on customer relationship management faced by the SMEs on the BM network. These key challenges are;

- Unexploited customer data and disorganized data management
- Lack of data-based business decision making
- Lack of ability to follow up on negotiation processes and closing deals
- Unsustainable customer relationships and low satisfaction
- Poor evaluation and assessment for operations and business performance
- Ineffective coordination within the team
- Lack of data protection systems
- Weakness in post sales and customer support services
- Lack of efficient time management on customer relationship management

To overcome these challenges, BM would like to support SMEs on the BM network with a CRM system and digital tools on team management, integrated training and one on one sessions to enable them to:

- Make data-driven decisions
- Increase cost effectiveness
- Increase productivity
- Managing and tracking sales, marketing, call center, logistics, and services easily
- Increased sales
- Better customer service
- Improved customer retention
- Access to detailed analytics about business data
- Centralized database of data
- Manage communications more effectively with prospective leads
- Streamlined internal communications and collaboration

**Project Deliverables:**

**Implementation Partner:**

- 1- Oversee overall project implementation with guidance from BM and in coordination with Workiom
- 2- Ensure a clear communication between SMEs and Workiom for service delivery
- 3- Coordinate with SMEs, Workiom and BM to conduct site visits as planned
- 4- Follow up all the deliverable milestones and ensure a clear and timely reporting on project progress and activities
- 5- Work with BM towards including both refugee and host community owned businesses, to promote social cohesion through business opportunities

**Workiom:**

Title	Description
Technical Tools Subscription	One year Subscription packages bundle for 100 SMEs includes for each account: <ul style="list-style-type: none"> <li>● 200K records.</li> <li>● 100 GB storage.</li> <li>● 40K automated actions.</li> <li>● Advanced permissions to customize the application.</li> <li>● Powerful integration tools with Whatsapp, Shopify, Mailchimp, Gmail, Wordpress, Meta leads, Google sheet, and CSV.</li> </ul>
Three applications tailor made for each company	<ul style="list-style-type: none"> <li>● Client Relations Management.</li> <li>● Task Management.</li> <li>● Cash flow or Order Management System.</li> </ul>

<p>Online sessions via Zoom &amp; In-Person training</p>	<ul style="list-style-type: none"> <li>● 7× Online training sessions on CRM Essentials/ each session 3 hours.</li> <li>● 3x In person participation to existing BM training sessions on digital transformation to provide training on Growth via CRM</li> </ul>
<p>Hosting</p>	<ul style="list-style-type: none"> <li>● Hosting Tenant Data and Storage on Customer’s AWS cloud service account.</li> <li>● Hosting Workiom Application Services costs are included in the offer.</li> <li>● Maintenance and Software updates are managed by Workiom.</li> <li>● Application Service security and customer data access.</li> <li>● Confidentiality is assured by Workiom.</li> </ul>
<p>Mentorship / Optimization (Customer Success)</p>	<p>Dedicated expert to service BM beneficiaries regarding the technical and business related inquiries.</p> <p>7 hours daily × 7 months Five Days A Week.</p>
<p>Site visit</p>	<p>CRM experts will be doing site visits to 50 SMEs</p>

**Expected Impact:**

The project is expected to generate impact measured by the following metrics:

Title	Description
Revenue report	1,000,000\$ in total / 10.000\$ for each SME on average
Growth report	Month-over-Month Growth measures MOM
Sales report	Increase in sales per SME

The table above describes the impact metrics and targets that the implementation partner will be responsible for and report on on a weekly and monthly basis.

Additionally BM will a monthly report for each SME to measure the detailed business performance (Marketing & sales & operation) through the following metrics:

Name of Metric	Description of Metric	Type of Metric
Marketing Qualified Leads (MQL)	The number of leads who indicated interest in what a brand has to offer based on marketing efforts.	Marketing
Sales Qualified Leads (SQL)	The number of leads which interested the brand has matched the offered product.	Marketing
Conversion Rate	The number of leads that converted to paid customers.	Marketing
Cost per Lead (CPL)	The cost of acquiring a lead.	Marketing
Return on Marketing Investment (ROMI)	The revenue generated per every dollar spent on paid marketing.	Marketing
Customer Lifetime Value (CLV)	The average generated revenue by a customer over the total period of its relation with the company	Sales
Customer Acquisition Cost (CAC)	The cost of acquiring a new customer.	Marketing
Customer Retention	The rate of retained customers of the total acquired number of customers over the same period of time.	Operation
Client Satisfaction Rate	The level of satisfaction among customers	Operation
Net Promoter Score (NPS)	The likelihood that customers would recommend a company, product, or a service to a friend or colleague.	Operation
Total revenue	The total amount of income generated from all operational and sales activities across all products and services.	Sales
Revenue by product or service	The income generated per product or service.	Sales
% of Revenue from new Business	Income generated from new clients	Sales
% of Revenue from existing customers	Income generated from cross-selling or upselling existing customers.	Sales / Operation
Month over Month Revenue	The revenue generated from month to month	Sales
Number of leads lost to competition	The number of leads that chose a product offered by competition	Sales
Avg Length of Sales Cycle	The average time required to convert a lead into a paid customer	Sales
Total number of opportunities	The number of qualified deals over a specific time period	Sales
Total closed of opportunities	The number of closed deals over a specific time period	Sales

Win Rate	The number of deals won is divided by the total number of deals. It can be measured by team and by individual.	Sales
Average lead response time	The average time required for a lead to respond to sales team	Sales
Percentage of leads dropped	The rate of leads that stops responding	Sales
Employee Satisfaction	The rate of satisfaction among employees for their work in a company	Operation
Lead Time	The average time needed to complete a task	Operation
Number of Tasks Completed by Time Unit	The average number of tasks completed over a specific period of time	Operation
Average Blocking Time	The average waiting period for a task to start	Operation
Average Delivery Quality	The quality of delivered tasks across the organization	Operation

## Qualifications for eligibility for submission

- Only CSOs/NGOs registered in Türkiye or that have direct activity permission from the Türkiye Ministry of Interior.
- Partnerships: Expanding our reach to Türkiye's CSOs community  
 In order for Building Markets to increase our impact in developing capacities with local organizations in Türkiye, we aim to establish sub-grants with organizations to incorporate new approaches, talents, and views into our service offering to refugee entrepreneurs. We engage with a diverse range of partners who share our commitment to a results-based approach. All eligible academic institutions and civil society organizations are encouraged to apply.
- No private companies or organizations.
- Experience implementing INGO sub-grants, and complying with the Turkish and US government. Partners should have mature administrative and finance systems in place to meet all administrative and financial requirements.
- Ability and acceptance to adapt internal processes based on Building Markets' requirements and guidance.



## Additional Eligibility Requirements

Before submitting a proposal, prospective partners should review all the terms and conditions and required certifications which will apply to this agreement, to ensure that they will be able to comply.

1. Applicant organizations must request a Unique Entity Identity Identifier (UEI) in the System for Award Management (SAM.gov) of the US Government. For more information, please visit the following sites, prior to submitting a proposal to Building Markets:
  - i. <https://www.gsa.gov/about-us/organization/federal-acquisition-service/office-of-systems-management/integrated-award-environment-iae/iae-systems-information-kit/unique-entity-identifier-update>
  - ii. [https://www.fsd.gov/qsafsd\\_sp?id=kb\\_article\\_view&sysparm\\_article=KB0046482&sys\\_kb\\_id=6b8149b2db2e7c10060d5425f39619a8&spa=1](https://www.fsd.gov/qsafsd_sp?id=kb_article_view&sysparm_article=KB0046482&sys_kb_id=6b8149b2db2e7c10060d5425f39619a8&spa=1). Please note that no agreement can be issued without a UEI.
  - iii. [https://www.fsd.gov/sys\\_attachment.do?sys\\_id=ebaa950d1b6a7850fe314000f54bcb94](https://www.fsd.gov/sys_attachment.do?sys_id=ebaa950d1b6a7850fe314000f54bcb94)
2. In addition to compliance with Turkish regulations, applicant organizations must comply with relevant statutes of the US Code of Federal Regulations.
3. United States 2 CFR Part 200 (<https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200>) (Code of Federal Regulations)
4. United States (<https://www.ecfr.gov/current/title-2/subtitle-B/chapter-VI/part-600>) (Code of Federal Regulations)
5. U.S. Department of State Standard Terms and Conditions (<https://www.state.gov/about-us-office-of-the-procurement-executive>)
6. U.S. Department of State Bureau of Population Refugees and Migration General NGO Guidelines (<https://www.state.gov/funding-opportunities/general-ngo-guidelines/>)
7. The applicant organizations must 1) comply with Executive Order 13224 barring transactions with entities that commit, threaten to commit, or support terrorism. The U.S. Department of Treasury maintains a list of identified prohibited entities at [www.treas.gov/ofac](http://www.treas.gov/ofac); 2) conduct any funded program activities in accordance with Building Markets Code of Conduct, and codes regarding protection from sexual exploitation and abuse in humanitarian crisis; 3) comply with 2 CFR 200.113 by disclosing, in a timely manner, in writing, all allegations or violations of Federal criminal law involving fraud, bribery, illegal gratuities and allegations of sexual exploitation and abuse potentially affecting the Federal award; and 4) together with Building Markets, ensure that design, implementation, and evaluation of program activities meet [Sphere standards](#).

## Required Qualifications

- Previous experience in conducting field work in the southeastern region of Türkiye, and in employing complex MEAL strategies.
- Previous experience in provision of services to SMEs and entrepreneurs.
- Demonstrated experience collecting large data sets and surveying.
- Demonstrated relationships and ability to collaborate with local government bodies, municipalities, chambers and other organizations as necessary.
- Fluency in English, Arabic and Turkish including excellent written, verbal communication.
- Have experience collaborating using G Suite applications and Microsoft Office tools (MS Excel).
- Willingness to participate in collaborative partnership with Building Markets, including prioritizing employing staff that Building Markets refers to for the project.

## Selection & Evaluation Criteria

Selection Criteria	Available Points
Financial Proposal	30 pts
Technical Proposal	70 pts
<ul style="list-style-type: none"> <li>Relevance of experience (field work in Building Markets' project cities - İstanbul, Ankara, İzmir, Gaziantep, Adana, Mersin, Şanlıurfa and Hatay regions of Türkiye, collaboration with local government bodies, familiarity with refugee and host community SMEs and entrepreneurs, references)</li> </ul>	35 pts
<ul style="list-style-type: none"> <li>Clarity and responsiveness of proposal</li> </ul>	35 pts
<ul style="list-style-type: none"> <li>Previous partnership experience with INGOs &amp; international organizations</li> </ul>	10 pts

## Terms and Conditions

### General Terms and Conditions

Building Markets will review all proposals and score them based on the above criteria. Preferred and backup suppliers will be selected, after which a contract will be signed between the two parties.

Building Markets is not bound to accept any proposal, nor award a contract/ purchase order, nor be responsible for any costs associated with the preparation and submission of a proposal or cost proposal, regardless of the conduct or outcomes of the selection process.

Building Markets reserves the right to accept or reject any proposal, to render any or all proposals as non-responsive, and to annul the solicitation process and reject all proposals at any time prior to award of contract, without thereby incurring any liability to the affected supplier, or any obligation to inform the affected supplier(s) of the grounds for Building Markets' action. Building Markets shall neither be obliged to award the contract to the lowest price offer.

#### Conflict of Interest

Building Markets takes special care to comply with transparency, accountability, and generally applied work ethics within all domestic and donor regulations, and international laws applicable to the countries where it operates.

Any attempts or suspicion of misconduct to influence the integrity of the procurement process, whether by Building Markets personnel or outside suppliers, will be fully investigated. By submitting your price quotation, you accept to immediately declare any potential conflict of interest, even if cursory or unintentional, upon becoming aware of such for immediate internal review by the organization. Failure to declare such conflicts of interest, even if accidental, may result in litigation.

#### Non-disclosure Agreement and International Compliance

By submitting your price quotation, you agree that in the event of being selected to undertake this project, any team members involved in the development of the said project are willing to sign a non-disclosure agreement to maintain the confidentiality of the data involved.

You also agree to sign anti-terrorism and anti-fraud declaration forms and have your name searched against an international database conducting terrorism background checks. There is no additional burden to you as a supplier; only consent is required.

#### Compliance with personal data protection laws

Building Markets is committed to ensuring the security and protection of the personal information that we process, and to providing a compliant and consistent approach to data protection. If you have any questions related to our personal data protection compliance, please contact our Data Protection Officer ([dpo@buildingmarkets.org](mailto:dpo@buildingmarkets.org)) or make a Data Subject Access Request, which can be accessed from our website ([www.buildingmarkets.org](http://www.buildingmarkets.org)).

For the purposes of this RFP, the prospective supplier represents and warrants that it or any of its potential subcontractors are in full compliance with the Law on the Protection of Personal Data numbered 6698 (hereafter referred to as the “KVKK”) and any relevant applicable data protection legislation (hereafter referred to as the “Data Protection Regulations”).

## Submission Instructions

To respond to this RFP, prospective bidders are required to submit the following documents:

Email submission	Email your technical and financial proposal in PDF format to <a href="mailto:turkey.tenders@buildingmarkets.org">turkey.tenders@buildingmarkets.org</a> with the subject line “Price quote for SGA-22-06 SME Digital Growth Tools - CRM Systems” by December 23, 2022 17:00 Türkiye time.
Submission Checklist	<p>Submissions to include:</p> <ol style="list-style-type: none"> <li>1. Financial Proposal in USD using the attached RFP Proposal Template:             <ol style="list-style-type: none"> <li>a. Price offer to include all relevant taxes including VAT,</li> <li>b. Annotate with notes to illustrate items requiring further clarification such as goods &amp; service delivery timelines, taxes calculations, foreign exchange conversions, etc.</li> </ol> </li> <li>2. A technical proposal using the attached RFP Proposal Template, including:             <ol style="list-style-type: none"> <li>a. Ability to deliver on the scope of work,</li> <li>b. Detailed work breakdown structure &amp; timeline,</li> <li>c. Profile of key personnel including resumes and short bios,</li> <li>d. Portfolio demonstrating expertise in subject matter and previous experience delivering on similar scopes of work.</li> </ol> </li> <li>3. Curriculum vitae (CVs) for three key staff;</li> <li>4. The organization registration documents with the Turkish authorities;</li> <li>5. Provide the following for your organization:             <ol style="list-style-type: none"> <li>a. Official registered name and contact details,</li> <li>b. Key contact name, title, address (if different from above) address, direct telephone numbers, and email addresses,</li> <li>c. Signatories, individuals who are authorized to contractually bind the organization for any proposal against this RFP.</li> </ol> </li> </ol>
Question and Answers	<p>Building Markets manages an open and fair tender process. All questions from potential bidders are answered as soon as possible and shared publicly with other interested parties.</p> <p>Please email your questions to <a href="mailto:turkey.tenders@buildingmarkets.org">turkey.tenders@buildingmarkets.org</a>. Your questions will be added to the below link, answered as soon as possible and publicly shared with all interested bidders.</p> <p>Please click on “Request Access” on the link below and we will grant your access as soon as possible.</p> <p>Q&amp;A document can be found here: <a href="#">Link</a></p>