**Prequalification Questions**

**Contract No. Q111487**

**Supply, Implementation and Maintenance of CRM for Shopping Mall**

**General Instructions**

The responses to the questions below by applicants for prequalificationshall provide complete, true, accurate and up to date information required to enable the MTR Corporation Limited (the Corporation) to prequalify the Applicant to tender for the Contract as described in the Prequalification Questionnaire.

When completing this Prequalification Questionnaire, Applicants shall be aware of the following conditions:

1. The Corporation shall treat all responses in this Prequalification Questionnaire as confidential and undertakes not to disclose the responses to others (with the exception of the Corporation's financial, legal and insurance advisors and the Government of Hong Kong Special Administrative Region, as appropriate, during the prequalification and the tender assessment period).
2. Completion of the Prequalification Questionnaire shall not bind the Corporation to invite an Applicant to submit a tender and no reasons shall be given for the exclusion of unsuccessful Applicants.
3. The composition of the list of tenderers shall rest entirely with the Corporation and its decisions shall be final.
4. In the event that the applicant has or may have a conflict of interest which may affect its judgment in relation to the contract or its ability to properly discharge the works or services to be delivered (including dealings with third parties), then the applicant shall immediately notify the Corporation as to the nature of the conflict or potential conflict of interest and thereafter shall discuss and agree with the Corporation what action is necessary to resolve the conflict.
5. The Applicant shall not, and shall ensure that its directors, employees, agents and subcontractors shall not, offer or give any advantage as defined in the Prevention of Bribery Ordinance (Cap. 201) to any employee or agent of MTRCL. Any breach of or non-compliance of this condition by the Applicant shall, without affecting its liability for such breach or non-compliance, result in its application not being considered.

**Project Background**  
The loyalty program of MTR’s luxury shopping mall has been established for years. This program brings business conversion to our tenants and the mall by establishing loyalty with high net-worth customers. The CRM supports the loyalty program to manage members, promotions, and rewards.

With the rapidly evolving retail market, especially for customer share in the luxury sector, competitors have established their loyalty programs with marketing automation to timely target high-quality customers and travelers in recent years. The shopping mall needs a new CRM to support the business in this evolving competitive landscape and increasing customers’ expectations.

**Project Scope**

The scope of services includes the following:

* Implement CRM to support the following functions:
  + Membership management supporting multi-tier and associated membership
  + Loyalty, promotion and reward management
  + Generation of analytics and operation reports
* Provide a concierge application facilitating frontline staff to perform personalized customer service and frontline operations such as point and gift redemptions.
* Provide loyalty member portals as Mobile App and Responsive Web App/ WeChat Mini program.
* Provide a merchant portal for gift voucher redemption activities.
* Provide a back-office application for promotion and reward management.
* Integrate with third-party systems including but not limited to Marketing Automation Platform, Content Management System, Analytics Platform, OCR Engine and Carpark System.
* Supply and installation of a loyalty solution to fit luxury shopping mall business.
* Customization to meet business operation and system integration requirement.
* Design, build (customize), test, training, implementation, etc. of the new system.
* Data migration from existing to the new system.
* System maintenance & support services

**Prequalification Question (\* Mandatory Fields)**

1. Provide company profile including the organization structure, business nature, business registration (BR), CRM related products, technical support team capabilities and clients list in below table.

|  |  |
| --- | --- |
| Company Name*\** |  |
| Year of Company Establishment*\** |  |
| Contact Person*\** |  |
| Telephone No.*\** |  |
| Email Address*\** |  |
| Number of local staff in Hong Kong*\** |  |
| Number of staff in Mainland China*\** |  |
| Any quality-related certificates at company level | *Example - ISO-9001/CMMI* |
| Business Registration certification (BR)\* |  |
| Financial Report for latest 3year*\** |  |

1. Provide the solution information in below table, if the solution involves multiple components with different technologies, operations and license models, please specify clearly by components.

|  |  |
| --- | --- |
| Solution Product(s)*\** | CRM:  Loyalty Reward Engine:  Other (please specify):  *(Note: Please provide the product specifications)* |
| Products Owner*\** | Yes / No#  *# If “No”, please specify the owner’s profile and whether the Product Owner will partner to implement, enhance and maintain their products:*  Product Owner’s company profile as required in Section 1.  Implement as partner in this project: Yes / No |
| Product Origin*\** | Hong Kong / Mainland China / Other (please specify)  *(Note: Product of Mainland China will have advantage)* |
| Solution Model Option(s)*\** | SaaS / Package Solution with customization / Be Spoke / Other (please specify)  Licensing/ Subscription Model (if applicable): |
| Hosting Model Option(s)*\** | Model: On Premises in MTR / Public Cloud / Private Cloud/ Other (please specify)  Data Center Geographic Location (if applicable):  *(Note: On-premises option must be available)* |
| Support Operating System(s)*\** |  |
| Provide 24x7 local Hong Kong technical support*\** | Yes / No |
| The solution is open for source code scanning*\** | Yes / No#  *# If “No”, please specify if the components have been certified by a qualified party on cybersecurity* |
| The solution support lifecycle is beyond year 2030 with all necessary patches for defect and security fixes*\** | Yes / No |
| ISO-27001 certified*\** | Yes / No |
| Other quality-related and cybersecurity-related certificates | *Example - ISO-9001/CMMI/DJCP…* |
| Comply with MTR’s security requirement as stated in Appendix 1 & 2\* | Yes / No |

1. Provide at least 3 relevant project references that implemented (kick-started/ completed) within the last 5 years for CRM related clients of shopping mall / luxury retail / hospitality / airline business with multi-tier membership loyalty program in Hong Kong, Macau or Mainland China.
   * At least **one single project** reference must **be using your/ partner’s CRM with loyalty reward engine which has an integration with a Mobile/ Wechat App**. The link of the Mobile App for the public to download must be provided.
   * Across your client references **must** also cover implementation of Mobile App.
   * Project references covering Marketing Automation Integration and WeChat mini program functions are preferred.
   * The contract sum for each project must be over HKD $3M. The total sum of 3 project references provided with highest contract sum must be over HKD $8M.

Project Reference#1 (highest contract sum first)

|  |  |
| --- | --- |
| Client & Contact & Region*\** | Client:  Contact:  Tel:  Email: |
| Industry*\** | Shopping mall, luxury retail, hospitality, airline, Other (please specify)  Multi-tier membership & International Member Base: Yes / No |
| Membership Size*\** | *(Over 100K / Over 500K / Over 1M members)* |
| Project Description & Scope*\** | *Example - Implementation for MTR Malls Loyalty Program*  *Scope: CRM, Loyalty Engine, Member App & Redemption Counter app* |
| Project Duration *(Project kick-started or completed within last 5 years)\** | \_\_ months  From mm/yyyy, To mm/yyyy |
| CRM Platform name & version*\** |  |
| Marketing Automation Tool name & version (if applicable) |  |
| Customer facing channels Implemented*\** |  |
| Publicly available download/ access links of Customer facing channels Implemented*\** |  |
| Contract Sum (HKD)*\** | (Only include projects over HKD $3M) |

Project Reference#2

|  |  |
| --- | --- |
| Client & Contact & Region*\** | Client:  Contact:  Tel:  Email: |
| Industry*\** | Shopping mall, luxury retail, hospitality, airline, Other (please specify)  Multi-tier membership & International Member Base: Yes / No |
| Membership Size*\** | *(Over 100K / Over 500K / Over 1M members)* |
| Project Description & Scope*\** | *Example - Implementation for MTR Malls Loyalty Program*  *Scope: CRM, Loyalty Engine, Member App & Redemption Counter app* |
| Project Duration *(Project kick-started or completed within last 5 years)\** | \_\_ months  From mm/yyyy, To mm/yyyy |
| CRM Platform name & version*\** |  |
| Marketing Automation Tool name & version (if applicable) |  |
| Customer facing channels Implemented*\** |  |
| Publicly available download/ access links of Customer facing channels Implemented*\** |  |
| Contract Sum (HKD)*\** | (Only include projects over HKD $3M) |

Project Reference#3

|  |  |
| --- | --- |
| Client & Contact & Region*\** | Client:  Contact:  Tel:  Email: |
| Industry*\** | Shopping mall, luxury retail, hospitality, airline, Other (please specify)  Multi-tier membership & International Member Base: Yes / No |
| Membership Size*\** | *(Over 100K / Over 500K / Over 1M members)* |
| Project Description & Scope*\** | *Example - Implementation for MTR Malls Loyalty Program*  *Scope: CRM, Loyalty Engine, Member App & Redemption Counter app* |
| Project Duration *(Project kick-started or completed within last 5 years)\** | \_\_ months  From mm/yyyy, To mm/yyyy |
| CRM Platform name & version*\** |  |
| Marketing Automation Tool name & version (if applicable) |  |
| Customer facing channels Implemented*\** |  |
| Publicly available download/ access links of Customer facing channels Implemented*\** |  |
| Contract Sum (HKD)*\** | (Only include projects over HKD $3M) |