



Scope of Work

Public Sector CRM System Design in Aqaba Special Economic Zone Authority

SOW #	SOW-153-2011
RFP #	RFP-033-2011
Potential candidates:	Jordanian IT Companies
Local / International:	Local
Prime Contract Name:	Aqaba Community and Economic Development (ACED) Program
Prime Contract Number:	278-C-00-08-00301-00
Period of Performance:	o/a February 2011 – o/a October 2011

I. ACED PROGRAM BACKGROUND

The Aqaba Community and Economic Development (ACED) Program is a five-year project funded by the United States Agency for International Development (USAID), benefiting the people and businesses of the Aqaba Special Economic Zone (ASEZ).

The ACED Program is based in Aqaba city and is composed of activities under three major technical areas of work:

- **Strengthening Government Institutions** ACED strengthens the government institutions in Aqaba and works directly with the Aqaba Special Economic Zone Authority (ASEZA) and Aqaba Development Corporation (ADC).
- **Strengthening Private Sector** ACED supports private sector growth by enabling the business environment to more effectively attract, support and enhance the number, competitiveness, and capabilities of Micro, Small and Medium Enterprises (MSMEs). In addition, the program works to organize various sectors through business associations to better serve their respective audiences in Aqaba.
- **Enhanced Community Development** ACED works closely with ASEZA to empower Community-Based Organizations (CBOs) and encourage the local community to participate in the decision-making process. In addition, the ACED works to reduce poverty in underprivileged communities.

In addition, cross-cutting training and a small grants and commodities program support various activities within the ACED program areas.

2. ACTIVITY BACKGROUND

The Aqaba Special Economic Zone Authority (ASEZA) and the Aqaba Development Corporation (ADC) provide services to a wide range of customers. ASEZA was established in 2001 to serve as a model for the Government of Jordan in terms of service delivery. To that end, and in its efforts to provide e-services to its internal and external clients, ASEZA has implemented several systems to automate administrative processes and facilitate e-services.

ASEZA has launched a one-stop-shop system to provide a high level of service to the citizens and businesses of the Economic Zone. The different services offered through the one-stop-shop are organized by Directorate, and each Directorate utilizes its own systems with no unified portal for all services.

To address this issue, ASEZA wishes to implement a “Public Sector” Customer Relationship Management (CRM) system. Customers may be defined as, but are not limited to: citizens, current businesses, potential businesses, investors, and non-profit organizations. The CRM system will allow ASEZA to provide its customers with flexibility in servicing their needs and managing various requests and inquiries. The CRM system should integrate all current systems into one portal using a unique customer number for each client to view current and previous requests / inquiries.

The CRM system should integrate email servers and a call centre to accept requests and track inquiries and/or complaints through various modes of input, including in person at one of ASEZA's service centers, electronically via the Internet, email and by phone. In addition, the CRM allows customers to receive feedback concerning their requests through various modes, including secure web access, SMS, email, etc.

In addition to ASEZA, the CRM system will be used by the Aqaba Development Corporation (ADC) for services that are integrated and/or require close cooperation between ASEZA and ADC, such as Corporate Social Responsibility services and the Investment services. The system should be flexible to allow for future integration with other governmental entities in Aqaba if needed.

3. DESCRIPTION of the ASSIGNMENT

3.1. Specific Objective

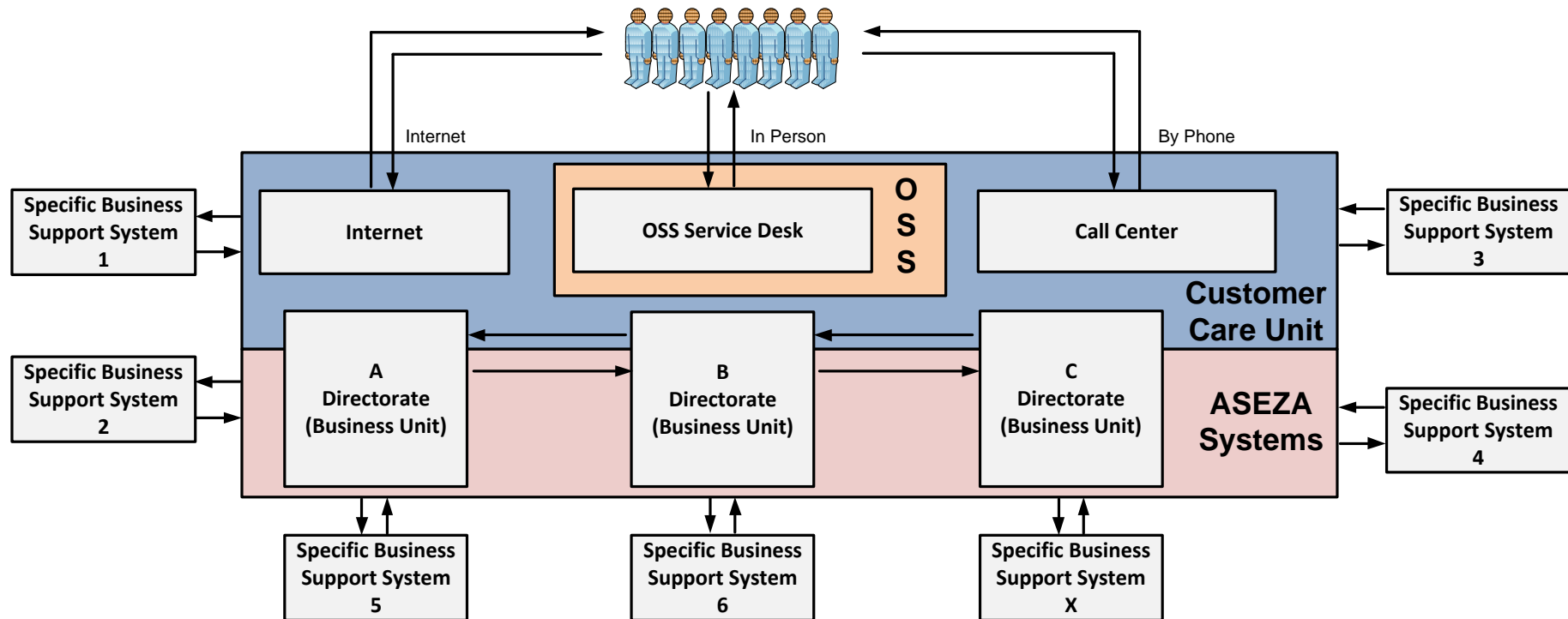
The main objective of this activity is to implement a Public Sector CRM System that includes a Marketing Management module and a Customer Services module to manage all customer requests/inquiries. The CRM system will assist ASEZA and the ADC enhance their customer relationship management and improve customer's experience in living, visiting and/or doing business in Aqaba.

The CRM system should seamlessly integrate with existing CRM related systems at ASEZA (Oracle EBS, AWAD, ERPS, OSS and others). Certain business specific support systems will also be integrated so that certain services are fulfilled and tracked by the CRM system.

The system's conceptual design is presented on the following page. A comprehensive description of ASEZA's current CRM environment can be found in the appendices to this document.

Conceptual CRM System Design

CLIENTS



CRM System with other ASEZA Systems

CRM: an "Integration Layer" between customers and service related systems in the organization.

3.2. Overall System Description

ASEZA will establish a new Customer Care Unit to manage the CRM system. The proposed CRM system shall allow this unit to handle customer requests through several modes of interaction, including in person, over the internet, and by phone. These requests can include requesting a particular service, filing a complaint, checking on the status of a ticket, requesting information regarding a service (needed documents, where to start, etc), and following up on any of the above.

The system shall provide customers with the tools and information necessary to initiate requests and guide them through the process. This includes providing online information based on each request, user-friendly electronic forms, etc. At the same time, some customers may initiate the services in person at ASEZA's service centers, in which case the Customer Care Unit employee shall be able to provide customers with guidance based on information in the CRM system.

Once a request has been placed in the system, the customer shall receive a ticket summarizing the service request and include a unique customer number. The customer can follow up on the status of his/her request using this number in person and online.

Once the CRM system has issued a numbered ticket, the system shall communicate with other systems at ASEZA to complete the service cycle based on standard workflows. In some instances, the full cycle may be automated, while in other cases the Customer Care Unit employee may have to direct the request to the relevant Directorate.

Once the request has been fulfilled, the customer shall be informed by the system through email, SMS, phone, or any other means that his/her request has been successfully completed.

3.3. Requested Services

- Conduct a study on current customer service processes in ASEZA (by reviewing current processes and by meeting stakeholders). The study should cover in detail all services-related processes and define how each service will be handled through customer communication channels (in person, by phone and through the Internet). A list of main services is provided in appendices of this document as a guideline, and shall be considered as the minimum list of services to be included in the CRM system (other services may include those of the Customs and Taxes Directorate, among others).
- The consultant shall develop new e-enabled application forms for all services, inquiries and complaints in ASEZA and the ADC that will be managed by the CRM system. The assignment will include business process reengineering for all the relevant services, and the relevant internal and external processes for each service shall be shortened in steps and time needed to provide services.
- Produce documentation (using cross-functional process documentation tools like ARIS, Visio, etc.) to document processes for services to be managed by the CRM and produce a detailed document for the specification of how each process will be managed and administered within the scope of the new CRM system's implementation.
- Produce a report on current marketing and sales management processes in ASEZA and ADC based on meetings with stakeholders from relevant directorates. The report should detail the requirements for a CRM system in support of the institutions' marketing and sales management activities and document the roles and responsibilities of business units involved in sales and marketing.
- Study and analyze the scope of all existing ASEZA and ADC applications that store and/or manage customer information.
- Deliver a document detailing the implementation of a central information source for customer data. The document should detail the integration with existing ASEZA and ADC systems relevant to the CRM system.
- Study the system hardware and infrastructure requirements and assure the readiness of the ASEZA IT environment to host the new CRM System. If new hardware is needed, ASEZA's MIS Department will lead and facilitate the procurement prior to the implementation of the CRM system.

- Install the CRM system in close coordination with and under the supervision of ASEZA’s MIS Department.
- Lead in the Computer Telephony Integration (CTI) with the current Call Center System of ASEZA, assuring the utilization of the two systems in the CRM.
- Implement the Customer Information Centric system.
- Develop and document testing scenarios for each of the implemented systems (modules) and participate in the testing of systems with stakeholders.
- Along with the designated parties in ASEZA and ADC, manage and lead the rollout of the implemented systems (modules) assuring the smooth utilization of the systems in each of the designated business units.
- Implementation of reporting tools which are available for the designated modules including a intelligence dashboard and KPI score card at different management levels of ASEZA and ADC.
- Develop 20 information report templates based on the input of internal and external stakeholders.
- Deliver training to end-users upon the completion of the implementation of the CRM system and Customer Information Center.
- Provide the cost of licenses (if any) for the system. The cost should be included in the financial proposal as an optional item. ASEZA may procure licenses separately if needed.
- Provide maintenance and support for the implemented systems, including two (2) years of support of the system after the end-date of the contract.

4. EXPECTED RESULTS

The implementation of a fully documented functional and effective Public Sector CRM and Customer Data Center within ASEZA and ADC that significantly improves service delivery levels with streamlined and integrated administrative processes.

5. REQUIREMENTS

Below is a list of functional requirements for the CRM system.

General CRM System Requirements
Web enabled (internet).
Based on leading public sector CRM systems.
Provide business intelligence reporting to be used for operational and analytical purposes. Ready-made reports should be generated with the ability to build customized reports.
Provide customer service process analytics and compare them with pre-defined internationally accepted KPI’s and with other customized KPI’s.
Provide real-time alerts across the organization on late service delivery.
Be seamlessly integrated with the existing AWAD System, Oracle E-Business Suite using Service Oriented Architecture (SOA) and Business Process Execution Language (BPEL).
Ability to design & present dashboards for different levels of managers to ensure the accurate and prompt monitoring of the work process.
Ability to integrate with Microsoft Exchange Server and Microsoft Outlook to synchronize calendar appointments, contacts (clients) and tasks.
Data and reports should be easily generated from the CRM system and extracted to Microsoft Office applications; mainly MS-Excel and MS-Word.

Customer Data Centric System Module Functional Requirements
Ability to integrate with ASEZA and ADC systems that are related to customer information.
Provide for a central customer data storage facility using a unique customer service number.
Flexibility to schedule instant/delayed synchronization of data to/from the other customer information systems within ASEZA.
Telephony Customer Service System Module Functional Requirements
To offer seamless complete CTI integration with the current ASEZA Call Center System (ERICSSON SOLIDUS eCARE™) and the flexibility to integrate with other Call Center technologies.
Prioritize calls answers for critical customer treatment to ensure the best quality of service for investors and clients with priority service fulfillment needs.
Provide telephony advanced queuing features like overflow treatment and group queuing for calls.
Ability to identify the customer and provide his/her comprehensive information, history of interaction, affiliation with other individuals once the call is transferred to the Customer Service agent.
The Call Centre Representative should be able to refer to a knowledgebase content system containing answers to the customer's inquiries. This knowledgebase is part of the CRM system and is fed and updated as needed by responsible employees.
Route and track customers' requests or tasks.
Customer Service System Module Functional Requirements
Log, assign and track customers' requests or tasks.
Ability to escalate requests and assign tasks according to pre-defined service processes.
Service requests fulfillment at ASEZA customer service centers by appointment booking and optimized dispatching of service specialists.
Ability to utilize portable devices like laptops or PDA's to interact with the system either in online or offline modes.
Minimize the use of paper in the services fulfillment process.
The Customer Service Representative should be able to refer to a knowledgebase content system containing answers to customer's inquiries. This knowledgebase is part of the CRM system and is fed and updated as needed by responsible employees.
Publish select implemented services on the internet.
Ability to integrate the Web enabled services to the government web payment gateway so that the service fees can be collected when applicable.
Automatically respond to customers' e-mails.
Utilize web and SMS technologies to interact with clients during and after the services fulfillment process.
The system should provide or have the ability to provide or integrate with a service survey system in order to collect and analyze the customer service experience from the client point of view.
Marketing & Sales Management System Module Functional Requirements
Provide the opportunity to manage and launch marketing campaigns in a short planning scheme.
Provide the opportunity to launch marketing campaigns targeting different segments of clients, potential clients, investors, citizens or tourists through different communication channels.
Integrate with the Services modules to execute marketing campaigns.

Other CRM System Requirements

Ability to handle at least 500 service requests daily initially and up to 3,500 customer service requests daily after one year of implementation.

Ability to respond instantly to users with a maximum average of 3 seconds of response time.

Capability to be upgraded.

24/7 availability is expected of the system to service clients through the Internet. The Customer Data Center needs to be available anytime to support other systems.

Seamless integration is needed with systems and technologies such as ASEZA's Oracle ERP system and AWAD system and other ASEZA systems including ASYCUDA, TAQDEER, and SAGE CRM.

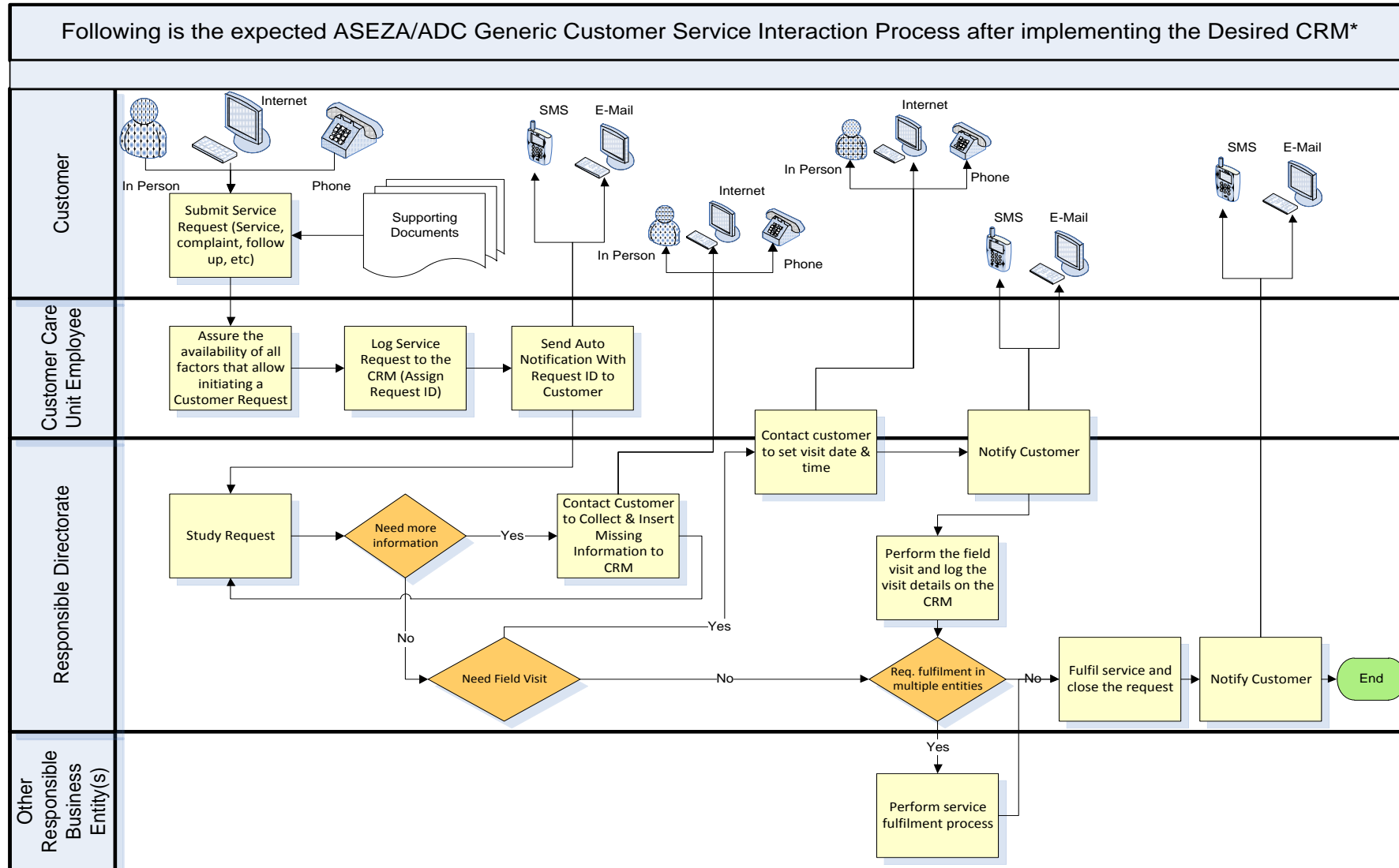
The system should support the capability of being implemented in phases, so the offering of system services can be presented through functions/modules.

Monitoring and Evaluation and Key Performance Indicators

The CRM system must be able to monitor and evaluate ASEZA's customer service performance, and provide the ability to:

1. Monitor and identify ASEZA and ADC's performance using KPI's on different levels, including, but not limited to:
 - Directorate/Division Level
 - Service Level
 - User Level
2. Monitor performance through user friendly interfaces (dashboards).
3. Present performance data on two levels:
 - High-level using dashboards
 - Detailed-level using detailed analytical reports
4. Provide business intelligence and data mining tools, and the ability to track customers' history and patterns on different levels including but not limited to:
 - Specific customer
 - Customer type
 - Service type
 - Directorate
5. Define, update, delete KPI's.
6. Provide the ability to define new reports.
7. The required KPI's may include:
 - Number of total requests/inquiries received
 - Number of total requests/inquiries received categorized by (service, directorate, user,...)
 - Number of processed requests/inquiries categorized by (service, directorate, user,...)
 - Number of pending requests/inquiries categorized by (service, directorate, user,...)
 - Number of requests/inquiries exceeded service time categorized by (service, directorate, user,...)
 - Number/percentage of incomplete requests/inquiries (missing requirements)
 - Number of received calls
 - Number of complaints received categorized by (complaint type, directorate, user,...)
 - Average time to process complaints categorized by (complaint type, directorate, user,...)
 - Number/ percentage of unhandled complaints
 - Mean conversation time
 - Average Talk Time (ATT)
 - Time of delay a caller may experience while waiting in queue
 - Mean dealing time
 - Average Handling Time (AHT)
 - Number of calls (%) answered within a limited period
 - Number of calls per hour the operator handles
 - Number of calls (%) with the customer's problem(s) completely resolved

Following is the expected ASEZA/ADC Generic Customer Service Interaction Process after implementing the Desired CRM*



(*) During the Service Request fulfilment process, the client is able to inquire at any point of time about the status of his/her request by utilising In-Person, Phone, or Internet channels

It is essential to emphasize the following points:

- To achieve a paperless organization, customers should not fill in any paper application. The process starts once the customer arrives at the service desk and describes his/her needs. The Customer Service Representative (CSR) should retrieve available information and fill in the missing information in the CRM system. If the customer's signature is required, a filled request form is printed out of the CRM system by the CSR.
- The service request supporting documentation will be scanned and saved in the Document Management System. Available documentation submitted to support previous service requests by the client does not have to be requested/scanned and saved again, but it will be retrieved to assure its availability in the system. Some types of documents may not be scanned or be kept in the system.
- Documents produced by ASEZA/ADC for clients are to be electronically linked to their records so that they are used for future reference and also are referenced on the service request submission or fulfillment process.
- The customer service process is to be initiated in the new CRM system through any of the available customer communication channels (In-Person, Phone, Internet). The CRM will integrate the existing specific service management and fulfillment systems that are in place to ensure proper management of their designated areas of service. The CRM will keep track of the service fulfillment process.
- The CRM system is expected to manage customer services process management and fulfillment that are currently implemented manually. The CRM system must provide for the following:
 - The ability of customers to send and track the status of complaints/requests to both ASEZA/ADC.
 - The complaints expected to be received and logged via different communication channels.
 - Web complaints can be logged through several websites, including ADC website, ASEZA website, and Aqaba tourism site.
 - The ability to categorize the complaints and manage categories through adding, modifying and deleting categories.
 - The ability to initiate an auto response to customers when registering a new complaint including a ticket number to enable customers to follow-up on their complaints status.
 - The ability to redirect/route the complaints to the responsible Directorate and/or units.
 - Provide ASEZA's Customer Care Unit Manager with the ability to monitor all complaints and inquiries.
 - The ability to search and browse complaint/inquiry history for analysis purposes.
- A new Customer Care Unit is expected to be established within ASEZA to manage all customer related issues, including the administration and management of the CRM system in coordination with ASEZA's MIS Directorate. The CRM system needs to support the Customer Care Unit in providing services.
- The CRM system needs to represent the "front line" of ASEZA services and interaction with different types of customers, the CRM system must support communication via different channels through a:
 - One Stop Shop to manage in-person requests.
 - Future call center to manage requests by phone.
 - CRM web portal to manage requests through the Internet.
- If the customer wishes to apply his/her application in person, the CRM system must provide:
 - The one-stop-shop employee with e-forms to enter all needed data for the specific application. The e-forms must be designed as user friendly forms and minimize the need for typing.

- The same e-forms must be available as an option for use through a KIOSK at ASEZA's one-stop-shop by the customer directly.
- In case of customer requests, complaints or queries over phone, the call center employee must be provided with tools or forms to log and record the customer requests within the CRM system.
- The CRM system may provide the ability to generate a catalogue of services. This searchable catalogue will include information about but not limited to services steps, responsible Directorates, service time, required documents, and cost associated with services.
- In case a customer inquiry requires a technical expert's feedback, the CRM system must provide the Customer Care Unit with the ability to redirect/route the inquiry or issue to the responsible Directorate at ASEZA, in addition to providing the Customer Care Unit with tools or features to follow-up and track all tickets.
- In order for management to continuously collect and analyze customers' needs and expectations, and reflect findings and results on ASEZA and ADC development initiatives, it is preferred that the CRM system provide the Customer Care Unit with tools and features to support these tasks.
- The CRM system should promote a customer service-focused culture in ASEZA and ADC.
- The CRM system should manage customer interactions with ASEZA and ADC and monitor and evaluate customer interaction.
- The CRM system should analyze customer data and develop reports, summaries and recommendations for ASEZA management.
- The CRM system is expected to provide different types of customers with the ability to logon to their CRM accounts with ASEZA/ADC via the internet and track the status of current applications, as well as their applications history. Customers need to be provided with different browsing and search tools and techniques, using a simple, user-friendly interface.
- The CRM system must be flexible in handling all ASEZA customer related services including ASEZA's main services listed in the appendices to this document, taking into consideration that tax-related services must be included immediately with both One Stop Shop and CRM covered services.
- During the implementation of the CRM system, the contractor will revise ASEZA's current hardcopy and electronic forms, and propose new, simple and easy to use e-forms for customer-related applications.

A representative sample of ASEZA's current forms can be found in the appendices to this document.

6. KEY EXPERTS **

Project Manager

a) Education level	University degree in Computer Science, IT, Industrial Engineering, MIS, BIS, Business Administration, or related field. Master's degree preferred.
b) Specific experience	At least 10 years professional working experience in IT projects. Minimum 4 years of project management experience preferably within the government sector. Previous experience in leading a CRM system implementation project required. PMP certificate preferred.
c) Language requirements	Fluency in Arabic and English.
d) Other	A previous track record in the following fields is preferred: Business Applications related systems Customer Service & Communication Process One-Stop-Shops

Systems Architect / Administrator(s)

a) Education level	University degree in Computer Science, IT, Computer Engineering, Industrial Engineering, MIS, BIS, Business Administration, or related field. Master's degree preferred.
b) Specific experience	At least 8 years professional working experience in large enterprise IT systems design, development and implementation, with strong background in different platforms and technologies.
c) Language requirements	Fluency in Arabic and English.
d) Other	A previous track record in the following fields is preferred: Systems design and setup Distributed systems integration Computer Telephony Integration (CTI)

Business Analyst(s)

a) Education level	University degree in MIS, Industrial Engineering, BIS, Business Administration, or related field. Master's degree preferred.
b) Specific experience	At least 7 years professional working experience in business requirements gathering and business process improvement/re-engineering within the government sector.
c) Language requirements	Fluency in Arabic and English.
d) Other	A previous track record in the following fields is preferred: Public Sector Services Management Marketing and Sales Process Management Customer Data Centre info

System Implementers/ Software Developers

a) Education level	University degree in Computer Science, IT, Industrial Engineering, MIS, BIS, Business Administration, or related field. Master's degree preferred.
b) Specific experience	At least 5 years professional working experience in business applications development <u>and</u> implementation.
c) Language requirements	Fluency in Arabic and English.
d) Other	A previous track record in the following fields is preferred: Customer Data Center system/module implementation. Marketing and Sales activities system/module implementation. Services activities system/module implementation. Telephony Services activities system/module implementation.

**All experts proposed for the project must be Jordanian citizens.

7. LOCATION, DURATION AND REQUIREMENTS

- 7.1. **Starting date:** The starting date of the assignment is February 2011 or as soon as possible thereafter.
- 7.2. **Finishing date of the assignment:** The finishing date will be within nine calendar months from the inception of the assignment.
- 7.3. **Location & facilities:** The location for the assignment will be Aqaba, Jordan, working primarily within the premises of ASEZA, which will provide work space, communication lines (Internet, fax, and fixed line telephone), and access to printers and office supplies. The consultants are expected to use their own laptop computers.
- 7.4. **Reporting structure:** The consultants shall report to ACED Program COP and DCOP or their designee.

8. Deliverables

The successful vendor is required to prepare the following documents and reports to be submitted to the ACED Program within the time frames mentioned:

Document/ Report	Content	Due Date
<p>Inception Report</p>	<p>The Inception Report must include the following:</p> <p>Work Plan: A work plan for the assignment as a whole, providing an overview of the methodologies to be used, detailed Work Breakdown Structure (WBS) indicating detailed subdivisions of tasks and effort required to complete the project, time allocation, resources allocation, task dependencies and expected outputs and their timing.</p> <p>Project Charter Document: A statement of the scope, objectives and participants in the project. It provides a preliminary delineation of roles and responsibilities, outlines the project's objectives, identifies the main stakeholders, and defines the authority of the Project Manager. It serves as a reference of authority for the future of the project.</p> <p>Communication Plan: A document that defines the communication methods, timing, and documents to be used for communication during the project. It should describe how and when project parties will communicate important project information.</p>	<p>Draft version within 2 calendar weeks from the start of the assignment</p> <p>Final version within three calendar weeks from the start of the assignment</p>
<p>Business Requirements Document</p>	<p>Describe existing business processes and systems, business requirements, and define the improved business processes. A separate document should be produced for each system/module.</p> <ul style="list-style-type: none"> • Marketing & Sales • Services, per customer communication channel 	<p>Draft version within 2 calendar months from the start of the assignment (system/module)</p> <p>Final version within 3 calendar months from the start of the assignment</p>

System Requirement Specifications (SRS) Documents	<p>A separate document should be produced for each of the following business tracks (system/module):</p> <ul style="list-style-type: none"> • Marketing & Sales • Services, per customer communication channel <p>This document describes the requirements of the application and the behavior of the system in terms of the functional and non-functional requirements, and includes the system architecture and design plan.</p> <p>It should also include the detailed description of how the services will be provided by the system, including the re-design of the forms into an electronic, user friendly version.</p>	<p>Draft version within 4 calendar months from the start of the assignment</p> <p>In final version within 5 calendar months from the start of the assignment</p>
User Acceptance Testing Documents	<p>Testing Scenarios documents includes tests of the implementation of applications by tracking each of the possible scenarios to assure the proper implementation of each system/module. A separate document should be produced for the following system/module:</p> <ul style="list-style-type: none"> • Customer Information Center • Marketing & Sales <p>Services, per customer communication channel (In Person, Telephony, and Internet)</p>	<p>Draft version 6 calendar months after the start of the assignment.</p> <p>Final version two days before the date of the designated test.</p>
User Manual, Configuration, Help and Training Documents	<p>To be used as a guide for end-user interaction with the system and for end-user training purposes. The specific manuals are:</p> <ul style="list-style-type: none"> • Marketing & Sales activities end-user manual • Services activities end-user manual • Telephony Services end-user manual • Customer data center end-user manual 	<p>Final version a week after the completion of the User Acceptance Testing</p>
CRM System Implementation and Go Live	<p>Please refer to technical specifications in this document.</p>	<p>Within 8 calendar months from the start of the assignment</p>
CRM System Maintenance and Support	<p>2 year free maintenance, plus an offer for a 3 year maintenance and support agreement starting after the end of the second year.</p>	<p>Starts after final approval of the CRM system</p>

All work plans, reports and other documents prepared under the assignment should be in the English language. Each report/deliverable must be accompanied by an updated LOE report including documentation/timesheets for work done on the project. All the documents shall be submitted in hard and soft formats. All deliverable documents shall be in Gill Sans MT / 11.5, in accordance with ACED Program formatting requirements, and saved in Microsoft Word digital format. Any attachments not available in this format should be in Microsoft Excel, PowerPoint, or, if no other digital format is available for an attachment, Adobe Acrobat digital format is required.

The final Plan and Presentation may be in a format to suit ASEZA; however, one complete copy shall be in English and provided to the ACED Program. The Final Report, which shall include all the above deliverables, is to be submitted to akanaan@aced-jordan.com, jfouka@aced-jordan.com, and aconrad@aced-jordan.com.

9. INSTRUCTIONS to BIDDERS

9.1 General:

9.1.1 Technical Proposals must be organized as follows:

Part 1 – Company Profile

- Provide a brief description of the Contractor's experience and qualifications per the Company Profile requirements as stated above.
- Using the template in the appendices to this document, provide a description of at least 5 relevant projects. Contact information for references for each project must be included.

Part 2: Technical Approach and Methodology

- Describe your organization's approach to implementing this assignment using the template in Annex IV.

Part 3: Key Experts

- Provide a list of the key experts using the template in the appendices to this document.
- Provide full resumes/CVs of proposed experts to complete the work using the template in the appendices to this document.
- Signed statements of availability for each key expert using the template in the appendices to this document.

9.1.2 Financial proposals must include the total price for delivering above services and a narrative description of how the total price is calculated. A separate quote for additional support / maintenance should be provided. The financial proposal shall include an optional item for the cost of licenses, if any. ASEZA may purchase the licenses separately.

9.1.3 Questions should be submitted by email to info@aced-jordan.com and aced.jordan@gmail.com or fax to 03 201 7760 by the date listed below. No phone calls will be accepted. Unsolicited phone calls regarding this RFP may result in disqualification of the bidder.

9.1.4 The ACED Program reserves the right to make changes to the scope of work at any time and to conduct negotiations once a successful proposal is identified, or to make an award without conducting negotiations based solely on the written proposals if deemed in its best interest to do so.

9.1.5 The ACED Program reserves the right not to make any award. These Instructions to Bidders will not form part of the offer or of the Contract. They are intended solely to aid Bidders in the preparation of their proposals.

9.2 Proposal Submission

- 9.2.1 Language: The proposal and all associated correspondence must be in English. Any award document resulting from this request will be in English.
- 9.2.2 Proposals must be submitted by the following means:
 - 9.2.2.1 One (1) Original plus four (4) Hard Copies of technical proposals, and one (1) Original plus four (4) copies of financial proposals delivered by courier or hand-delivered to the ACED Program, 5th Residential Area, P.O. Box 2494, Aqaba 77110 Jordan by the deadline. Bidders must submit technical and financial proposals in separate sealed envelopes with each clearly marked.
 - 9.2.2.2 Electronic submission using separate CDs. One for the technical proposal and one for the financial proposal. The proposals must be submitted as single pdf files (one for technical one for financial)
 - 9.2.2.3 No email submissions will be accepted.
 - 9.2.2.4 Packages received after the closing date and time of this RFP will be disqualified.
 - 9.2.2.5 Bidders are responsible for requesting delivery confirmation for submissions.

9.3 RFTOP Delivery Schedule

RFP Released	December 9, 2010
Last day for receiving clarifications	December 20, 2010
Tentative Clarification Meeting	January 4, 2011 (Time to be announced)
Proposals Due	January 13, 2011 by 09:00 am
Tentative start of the assignment	February 1, 2011

**SHOULD ANY CHANGES IN THIS SCHEDULE OCCUR, A NOTICE WILL BE POSTED ON THE ACED PROGRAM WEBSITE WWW.ACED-JORDAN.COM. BIDDERS ARE RESPONSIBLE FOR CHECKING THE WEBSITE PERIODICALLY.*

10. EVALUATION AND AWARD

The ACED Program will evaluate each proposal quantitatively based upon the factors set forth below.

	Maximum	Initial assessment	Revised assessment (before interviews*)	Revised assessment after interviews*
TECHNICAL PROPOSAL (70%)				
Company Profile	30			
Years of experience	5			
Experience in similar projects	15			
Previous Public Sector CRM implementation	10			
Technical Approach and Methodology	35			
Project plan	5			
Organization & Methodology	10			
Technology and Tools	20			
Key Experts	35			
Expertise in CRM implementations	10			
Expertise in general information systems implementation	10			
Experts' years of experience	5			
Experts' education	5			
English language proficiency	5			
Total Technical Score (70%)*	100			
FINANCIAL PROPOSAL (30%)				
ADJUSTED OVERALL SCORE	100			

* Interviews may be held upon request which will contribute to the total technical score.

ANNEX I: ASEZA MAIN SERVICES

الرقم	الخدمة	الوحدة المقدمة	مدة تقديم الخدمة (يوم العمل)	كافة الخدمة
1	تسجيل قطعة أرض	قسم السجلات العقارية/مديرية التخطيط والدراسات	30	لا يوجد
2	تسجيل شقة	قسم السجلات العقارية/مديرية التخطيط والدراسات	30	
3	تنازل عن أرض	قسم السجلات العقارية/مديرية التخطيط والدراسات	14	أول مرة 25% من سعر التخصيص، للمرة الثانية 10% من السعر التقديري للأرض
4	السماح بتملك الأموال غير المنقولة للأشخاص غير الأردنيين	قسم السجلات العقارية/مديرية التخطيط والدراسات	30	لا يوجد
5	الحصول على شهادة تخصيصات أو تحري عن وقوعات الأراضي	قسم السجلات العقارية/مديرية التخطيط والدراسات	2	5دينار
6	فك الرهن	قسم السجلات العقارية/مديرية التخطيط والدراسات	3	لا يوجد
7	السماح بتملك الأموال غير المنقولة للأشخاص المعنويين	قسم السجلات العقارية/مديرية التخطيط والدراسات	3	في حال أن الأشخاص أردنيين، وفي حالة أن المالكين أجانب لحين وصول موافقة وزارة الداخلية
8	الحصول على موافقة إفراز أو توحيد أرض	قسم التخطيط/مديرية التخطيط والدراسات	30	لا يوجد
9	الحصول على موافقة أولية لمشروع إعمار خاص	قسم التخطيط/مديرية التخطيط والدراسات	30	لا يوجد
10	الحصول على مخطط موقع تنظيمي	قسم التخطيط/مديرية التخطيط والدراسات	3	10دينار
11	تغيير صفة استعمال أرض لمشروع اعمار/أو تعديل احكام بناء لمشروع اعمار	قسم التخطيط/مديرية التخطيط والدراسات	30	50دينار
12	الحصول على معلومات جغرافية) خرائط، مخططات، صور فضائية)	قسم المعلومات الجغرافية/مديرية التخطيط والدراسات	تحدد عند تقديم الطلب	حسب المعلومات المطلوبة

الرقم	الخدمة	الوحدة المقدمة	مدة تقديم الخدمة (يوم العمل)	كلفة الخدمة
13	الموافقة على المخططات الأولية	مديرية الترخيص ومراقبة الإعمار	10	لا يوجد
14	الموافقة على المخططات النهائية وإصدار رخصة مشروع اعمار	مديرية الترخيص ومراقبة الإعمار	14	لا يوجد
15	طلب الموافقة على المخططات تعديلية وإصدار رخصة مشروع اعمار	مديرية الترخيص ومراقبة الإعمار	14	لا يوجد
16	الموافقة على ترخيص لافتة	مديرية الترخيص ومراقبة الإعمار	6	لا يوجد
17	الحصول على تصريح مباشرة البناء لمشاريع الاعمار	مديرية الترخيص ومراقبة الإعمار	3	لا يوجد
18	الحصول على إذن صب	مديرية الترخيص ومراقبة الإعمار	2	لا يوجد
19	الموافقة على منح إذن اشغال	مديرية الترخيص ومراقبة الإعمار	10	لا يوجد
20	إعادة تأمينات الالتزام بأحكام مشاريع الاعمار	مديرية الترخيص ومراقبة الإعمار	2	لا يوجد
21	افراز المباني(تجزئة/توحيد)	مديرية الترخيص ومراقبة الإعمار	10	لا يوجد
22	الاعتراض على قرارات لجنة الترخيص ومراقبة الاعمار	مديرية الترخيص ومراقبة الإعمار	19	لا يوجد
23	الحصول على رخصة اعمال بنية تحتية	مديرية الترخيص ومراقبة الإعمار	1	لا يوجد
24	الحصول على براءة الذمة التنظيمية	مديرية الترخيص ومراقبة الإعمار	2	لا يوجد
25	صورة طبق الأصل عن مخططات الترخيص	مديرية الترخيص ومراقبة الإعمار	2	لا يوجد
26	الحصول على الشهادات اللازمة لمباشرة العمل لأول مرة (الشهادة الصحية، السلامة العامة، تصريح مباشرة العمل حسب مقتضى الحال)	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	14 يوم عمل للحصول على موافقات ويوم عمل من تاريخ دفع الرسوم لاصدار الشهادات	(200)دينار رسوم منح تصريح مباشرة العمل (25)دينار بدل اصدار الشهادة الصحية (50)دينار بدل اصدار شهادة السلامة العامة بدل جمع نفايات ويستوفى حسب

الرقم	الخدمة	الوحدة المقدمة	مدة تقديم الخدمة (يوم العمل)	كلفة الخدمة
				تعليمات بدل جمع النفايات والنظافة العامة في منطقة العقبة الاقتصادية
27	تجديد الشهادات اللازمة لمباشرة العمل (الشهادة الصحية، السلامة العامة، تصريح مباشرة العمل حسب مقتضى الحال)	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	7 أيام عمل للحصول على موافقات في حال الحاجة لذلك ويوم عمل من تاريخ دفع الرسوم لإصدار الشهادات	(100)دينار رسم تجديد تصريح مباشرة العمل (25)دينار رسم تجديد الشهادة الصحية بدل جمع نفايات ويستوفى حسب تعليمات بدل جمع النفايات والنظافة العامة في منطقة العقبة الاقتصادية
28	تعديل التصاريح اللازمة لمباشرة العمل (الشهادة الصحية، السلامة العامة، تصريح مباشرة العمل حسب مقتضى الحال)	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	14يوم عمل للحصول على موافقات ويوم عمل من تاريخ دفع الرسوم لإصدار الشهادات	(50)دينار بدل تعديل الشهادة الصحية وشهادة السلامة العامة (50)دينار بدل تعديل تصريح مباشرة العمل
29	طلب كتاب لمن يهمله الأمر (الشهادات اللازمة لمباشرة النشاط)	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	2	لا يوجد
30	الغاء طلب نموذج تيسير الاستثمار أو الشهادات اللازمة لمباشرة النشاط	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	2	لا يوجد
31	تسجيل المؤسسات في منطقة العقبة الاقتصادية الخاصة لأول مرة	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	7أيام عمل في حال موافقة مجلس المفوضين ويوم عمل في حال موافقة مدير مديرية الاستثمار ويوم عمل ن تاريخ دفع الرسوم لإصدار شهادة تسجيل مؤسسة مسجلة	(1000)دينار تستوفى لأول مرة رسوم سنوية لممارسة الأنشطة التجارية والصناعية والزراعية والخدمية (500)دينار عن كل نشاط تستوفى سنويا (15)دينار بدل اصدار تالف لشهادة

الرقم	الخدمة	الوحدة المقدمة	مدة تقديم الخدمة (يوم العمل)	كلفة الخدمة
				التسجيل (10)دينار بدل اصدار أي وثيقة تتعلق بتسجيل المؤسسة باستثناء اصدار صورة طبق الأصل من شهادة التسجيل) تعطى مرة واحدة عند التسجيل أو تجديده
32	تجديد تسجيل المؤسسات في منطقة العقبة الاقتصادية الخاصة	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	يوم عمل ن تاريخ دفع الرسوم لاصدار شهادة تسجيل مؤسسة مسجلة	الرسوم السنوية لممارسة الأنشطة التجارية والصناعية والزراعية والخدمية (15)دينار بدل تالف أو فقدان لشهادة التسجيل (10)دينار لقاء اصدار أي وثيقة تتعلق بتسجيل المؤسسة باستثناء اصدار صورة طبق الأصل من شهادة التسجيل) تعطى مرة واحدة عند التسجيل أو تجديده
33	تعديل شهادة تسجيل مؤسسة مسجلة	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	يوم عمل ن تاريخ دفع الرسوم لاصدار شهادة تسجيل مؤسسة مسجلة	(75)دينار بدل تعديل شهادة تسجيل مؤسسة مسجلة عند تغيير اسم المؤسسة المسجلة أو تغيير اسمها التجاري أو إجراء أي تغيير أو إضافة على نوع النشاط
34	طلب كتاب لمن يهمله الأمر (تسجيل مؤسسة مسجلة)	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	يوم عمل ن تاريخ دفع الرسوم المقررة	10دنانير
35	الغاء تسجيل مؤسسة مسجلة بناء على طلبها	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	2يوم عمل من تاريخ الحصول على الموافقات اللازمة	لا يوجد

الرقم	الخدمة	الوحدة المقدمة	مدة تقديم الخدمة (يوم العمل)	كلفة الخدمة
36	اصدار شهادات المنشأ	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	يوم عمل	يتم استيفاء رسوم شهادات المنشأ وذلك بالاعتماد على قيمة الفاتورة (0.001) من قيمة الفاتورة (وبحد أعلى 50 دينار) أمانات غرفة صناعة عمان) تستوفي السلطة 5 دنانير بدل خدمات عن كل شهادة منشأ يتم اصدارها في مكتب الغرفة لدى السلطة) ايراد سلطة منطقة العقبة الاقتصادية الخاصة)
37	ادخال الدراجات الآلية	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	9 أيام عمل	(5)دينار الحصول على نموذج طلب الادخال المؤقت (1)دينار طباعة وثائق الملف في حال قيام اللجنة بالكشف وفق أحكام تعليمات إجراءات تقدم طلب الادخال المؤقت للمركبات يستوفي مبلغ (50) دينار عن كل معاملة
38	ادخال المركبات الزراعية ومركبات الأشغال والآليات والمعدات	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	9 أيام عمل	(5)دينار الحصول على نموذج طلب الادخال المؤقت (1)دينار طباعة وثائق الملف في حال قيام اللجنة بالكشف وفق أحكام تعليمات إجراءات تقدم طلب الادخال المؤقت للمركبات يستوفي مبلغ (50) دينار عن كل معاملة

الرقم	الخدمة	الوحدة المقدمة	مدة تقديم الخدمة (يوم العمل)	كلفة الخدمة
39	الادخال المؤقت للمركبات في منطقة العقبة الاقتصادية الخاصة	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	9 أيام عمل	(5)دينار الحصول على نموذج طلب الادخال المؤقت (1)دينار طباعة وثائق الملف في حال قيام اللجنة بالكشف وفق أحكام تعليمات إجراءات تقدم طلب الادخال المؤقت للمركبات يستوفى مبلغ (50) دينار عن كل معاملة
40	ادخال المركبات الى المنطقة لغايات المعارض والمتاجرة بها	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	9 أيام عمل	(5)دينار الحصول على نموذج طلب الادخال المؤقت (1)دينار طباعة وثائق الملف في حال قيام اللجنة بالكشف وفق أحكام تعليمات إجراءات تقدم طلب الادخال المؤقت للمركبات يستوفى مبلغ (50) دينار عن كل معاملة
41	تجديد الادخال المؤقت للمركبات في المنطقة	قسم التصاريح وتسجيل الشركات/مديرية الاستثمار	7 أيام عمل	(5)دينار الحصول على نموذج طلب الادخال المؤقت (1)دينار طباعة وثائق الملف
42	اصدار تصريح واسطة نقل عمومي	قسم النقل/مديرية الاستثمار	نصف ساعة	لا يوجد
43	اصدار تصريح نقل يومية ومؤقتة خارج البلاد	قسم النقل/مديرية الاستثمار	نصف ساعة	لا يوجد
44	تجديد تصريح واسطة نقل	قسم النقل/مديرية الاستثمار	نصف ساعة	لا يوجد
45	شطب أو تحويل أو استبدال وسائط النقل العام	قسم النقل/مديرية الاستثمار	ساعة واحدة	لا يوجد
46	تبادل هياكل مركبات الركوب الصغيرة	قسم النقل/مديرية الاستثمار	ساعة واحدة	لا يوجد
47	نقل ملكية واسطة نقل عمومي	قسم النقل/مديرية الاستثمار	ساعة واحدة	لا يوجد
48	الحصول على تأشيرة زيارة أو تجديدها	قسم العمل والتأشيرات والإقامة/مديرية الاستثمار	2-4 أيام	لا يوجد

الرقم	الخدمة	الوحدة المقدمة	مدة تقديم الخدمة (يوم العمل)	كلفة الخدمة
49	إذن الإقامة	قسم العمل والتأشيرات والإقامة/مديرية الاستثمار	5-7 أيام عمل اذا تم تقديم المعاملة لأول مرة ومن-1-3 أيام عمل عند التجديد	(15)دينار عن اصدار بطاقة الإقامة وعند التجديد كذلك (15)دينار عن اصدار بدل تالف أو فاقد لبطاقة الإقامة
50	الحصول على تأشيرة العمل	قسم العمل والتأشيرات والإقامة/مديرية الاستثمار	5-7 أيام عمل ومن 1-3 أيام عند استكمال اجراءات التأشيرة والحصول على البطاقة	(65)دينار اصدار تأشيرة العمل في المنطقة اذا كانت مدة التأشيرة ثلاثة أشهر اذا زادت مدة التأشيرة عن ثلاثة أشهر، فيستوفى الرسم مرة واحدة بمعدل (65) دينار عن كل ثلاثة أشهر من المدة المطلوبة
51	تصريح العمل	قسم العمل والتأشيرات والإقامة/مديرية الاستثمار	5-7 أيام عمل اذا تم تقديم المعاملة لأول مرة ومن-1-3 أيام عند التجديد	(65)دينار اصدار تصريح العمل في المنطقة اذا كانت مدة التصريح ثلاثة أشهر اذا زادت مدة التصريح عن ثلاثة أشهر، فيستوفى الرسم مرة واحدة بمعدل (65) دينار عن كل ثلاثة أشهر من المدة المطلوبة (15)دينار عن اصدار بطاقة العمل (15)دينار عن تجديد بطاقة العمل (15)دينار عن اصدار بدل تالف أو فاقد لبطاقة العمل
52	الحصول على تأشيرة العمل للعاملين في المنازل	قسم العمل والتأشيرات والإقامة/مديرية الاستثمار	5-7 أيام عمل ومن 1-3 أيام عند استكمال اجراءات التأشيرة والحصول على بطاقة العمل	(65)دينار اصدار تأشيرة العمل في المنطقة اذا كانت مدة التأشيرة ثلاثة أشهر اذا زادت مدة التأشيرة عن ثلاثة أشهر، فيستوفى الرسم مرة واحدة

الرقم	الخدمة	الوحدة المقدمة	مدة تقديم الخدمة (يوم العمل)	كلفة الخدمة
				بمعدل (65) دينار عن كل ثلاثة أشهر من المدة المطلوبة
53	دفع مستحقات ضريبة الدخل	قسم ضريبة الدخل / مديرية الإيرادات	25 دقيقة	
54	فتح ملف ضريبي	قسم ضريبة الدخل / مديرية الإيرادات	25 دقيقة	
55	توريد مستحقات ضريبة الدخل	قسم ضريبة الدخل / مديرية الإيرادات		
56	فك الحجز عن قطعة أرض أو عقار مملوك	قسم الإجراءات والتنفيذ / مديرية الإيرادات	40 دقيقة	
57	طلب الحصول ببيان ضريبي	قسم الإجراءات والتنفيذ / مديرية الإيرادات	دقيقتين	
58	طلب الحصول على براءة ذمة	قسم الإجراءات والتنفيذ / مديرية الإيرادات	20 دقيقة	
59	تسجيل شركة لدى ضريبة المبيعات	وحدة التسجيل والإقرارات / مديرية الإيرادات		
60	إلغاء تسجيل شركة	وحدة التسجيل والإقرارات / مديرية الإيرادات		
61	تقديم الإقرار الضريبي	قسم الإجراءات والتنفيذ / مديرية الإيرادات		
62	الإعتراض على قرار تدقيق ضريبة	قسم التقدير والتدقيق / مديرية الإيرادات	25 دقيقة	
63	تخمين ضريبة الأبنية والأراضي	قسم التقدير والتدقيق / مديرية الإيرادات		
64	طلب الحصول على إعفاء	قسم التقدير والتدقيق / مديرية الإيرادات		
65	شكوى - مكافحة (قوارض/حشرات/حيوانات ضالة)	مركز خدمات المدينة	يتم معالجتها خلال 24 ساعة	
66	شكوى - خدمات النظافة	مركز خدمات المدينة		
67	طلب متعلق بإجراءات الدفن	مركز خدمات المدينة		

ANNEX 2: KEY EXPERTS OVERVIEW

Name of expert	Proposed position	Years of experience	Nationality	Educational background	Specialist areas of knowledge	Experience in Jordan	Languages and degree of fluency

ANNEX 3:

CURRICULUM VITAE TEMPLATE

FULL NAME

Title or Position

QUALIFICATIONS SUMMARY: This is the template. Begin to fill in your information here and please refer to this CV template when working on the format. Use correct grammar, formatting and wording, in order to provide a cohesive look for all CVs.

LANGUAGES: When classifying language abilities only use these terms

Language (native); Language (fluent); Language (basic); Italian (proficient)

EDUCATION:

Degree, Major, University Name, City, Country, Year

BS, Civil Engineering, X University, Someplace, XA, USA, 2222

CITIZENSHIP:

Jordan

EXPERIENCE:

Position, Name of Project, Donor, Employer, City, Country, Year – Year. Sentences should start with verbs. Use present tense for current work. Use phrases starting with verbs, such as: Managed and coordinated the Social Development Project along with the Ministries of Health, Foundation of the Infant-Maternal Nutrition Program, Ministry of Education, Preschool Fund, Central Office of Statistics and Computer Science.

Position or Role, Name of Project, Donor, Employer, City, Country, Year – Year.

PUBLICATIONS:

Last, First Initial. (Year). The origin of altruism. *Nature*.393, 639–640.

Last, R. (Year). *The mystery of capital*. New York, NY: Basic Books.

REFERENCES:< Must be from the last 3 years>

1. Title. Name, Title, Program, Employer, (Relationship, Year), Tel: (999) 999-9999, Email:
2. Title. Name, Title, Program, Employer, (Relationship, Year), Tel: (999) 999-9999, Email:
3. Title. Name, Title, Program, Employer, (Relationship, Year), Tel: (999) 999-9999, Email:

ANNEX 4: STATEMENT OF AVAILABILITY¹

RFP-033-2011 for SOW 153-2011

I, **insert expert's full name**, grant an exclusive commitment to serve as a key expert on **insert company name's** proposal in response to the above mentioned RFP, should **insert company name's** proposal be successful.

I understand that I am not allowed to present myself as a candidate on any other bidder's proposal for the above mentioned RFP. I am fully aware that if I do so, that **insert company name's** proposal may be disqualified.

Additionally I declare that I am not in a situation of conflict of interest

Name	
Signature	
Date	

¹ To be completed by all key experts

ANNEX 5: Technical Approach

To be completed by the Bidder

1. Rationale

- Any comments on the SOW of importance for the successful execution of activities, in particular its objectives and expected results, thus demonstrating the degree of understanding of the contract. An opinion on the key issues related to the achievement of the contract objectives and expected results.
- An explanation of the risks and assumptions affecting the execution of the contract.

2. Strategy

- An outline of the approach proposed for contract implementation.
- A list of the proposed activities considered to be necessary to achieve the contract objectives.
- The related inputs and outputs.
- In the case of a tender being submitted by a consortium, a description of the input from each of the consortium members and the distribution and interaction of tasks and responsibilities between them.
- A description of the support facilities (back-stopping) that the team of experts will have from the contractor during the execution of the contract.
- A description of sub-contracting arrangements foreseen, if any and within the limit indicated in clause 3 of the Instructions to Bidders, with a clear indication of the tasks that will be entrusted to a sub-contractor and a statement by the Bidder guaranteeing the eligibility of any sub-contractor.

3. Timetable of activities

- The timing, sequence and duration of the proposed activities, taking into account mobilisation time.
- The identification and timing of major milestones in execution of the contract, including an indication of how the achievement of these would be reflected in any reports, particularly those stipulated in the Terms of reference.
- The expected number of working days required from each category of expert each month during the period of execution of the contract (using the Excel spreadsheet linked to the Budget breakdown).

4. Log frame

- A Logical framework reflecting the considerations described in items 1 – 3.

ANNEX 6: Project Experience Table

Project Name	Location	Client	Contract Value	Period of Performance	Description of Activities/ Achievements	Client Reference (Name, title, email, phone)

ANNEX 7: DESCRIPTION OF THE CURRENT SITUATION

Marketing Management

There are a few business units that support the marketing management process in Aqaba and they exist in ASEZA and the ADC. These business units are:

- Investment & Real-estate development Unit in ADC
- Investor Relation & Marketing Unit in ADC
- Business Development & Marketing Section in ASEZA
- Tourism Marketing Section in ASEZA
- Investment Department in ASEZA

From a computer systems prospective, there are no significant business applications that exist at the ADC. Whereas in ASEZA, and from a CRM application prospective, a marketing and sales management SAGE CRM system has been implemented in the Business Development & Marketing Section and the Tourism Marketing Section. The system has not been utilized by any of the users of any Directorate. Although it covers all the basic marketing management processes and it can facilitate the life of the marketing experts, it could also improve the collaboration and automate the processing of the marketing activities management in the related business units.

Marketing activities are currently present in Aqaba through ASEZA and ADC, but marketing activities can't be managed, tracked, or evaluated because the existing marketing system is not utilized.

Services Management

ASEZA provides many services to its clients through its specialized Directorates, services which in some cases follow long procedures in order to commence, bearing in mind that sometimes supporting documents are mandatory for certain entities to help process the client's needs. In some cases, these services follow long paths between different directorates in the process of fulfillment. ASEZA has been working hard to define its services fulfillment processes aiming to facilitate these services management and in this context the MIS Directorate has been implementing different case specific systems that interact with its clients and manage these services workflow fulfillment processes.

Currently, specific purpose systems are in place helping each business unit manage its service fulfillment process; examples of these systems are ASYCUDA, ERPS, EVR and others.

There are many customer services provided by ASEZA. The services can be classified into either services that are customer initiated (requested) or customer services that are internally initiated within ASEZA as part of the regular mandatory client services operation. The services that are customer initiated (up to 200 services).

Some of these services are treated in business specific applications like the ASYCUDA or the Oracle Financial System (ERP). These systems will be kept and improved. Most of the rest of the services will eventually be treated within the framework of the One Stop Shop at its final destination.

One Stop Shop Initiative and System

Following the new management direction of enhancing the client services in Aqaba, ASEZA has launched an initiative to implement a One Stop Shop (OSS) methodology in delivering the services that are initiated by the client. Within the scope of the OSS implementation, and as a pilot test of the concept, ASEZA gathered under one roof the customer service people from four Directorates as an initial step to approach and sense the feasibility of their initiative. These directorates are:

- Labor, Visa and Residency Directorate
- Investment Directorate

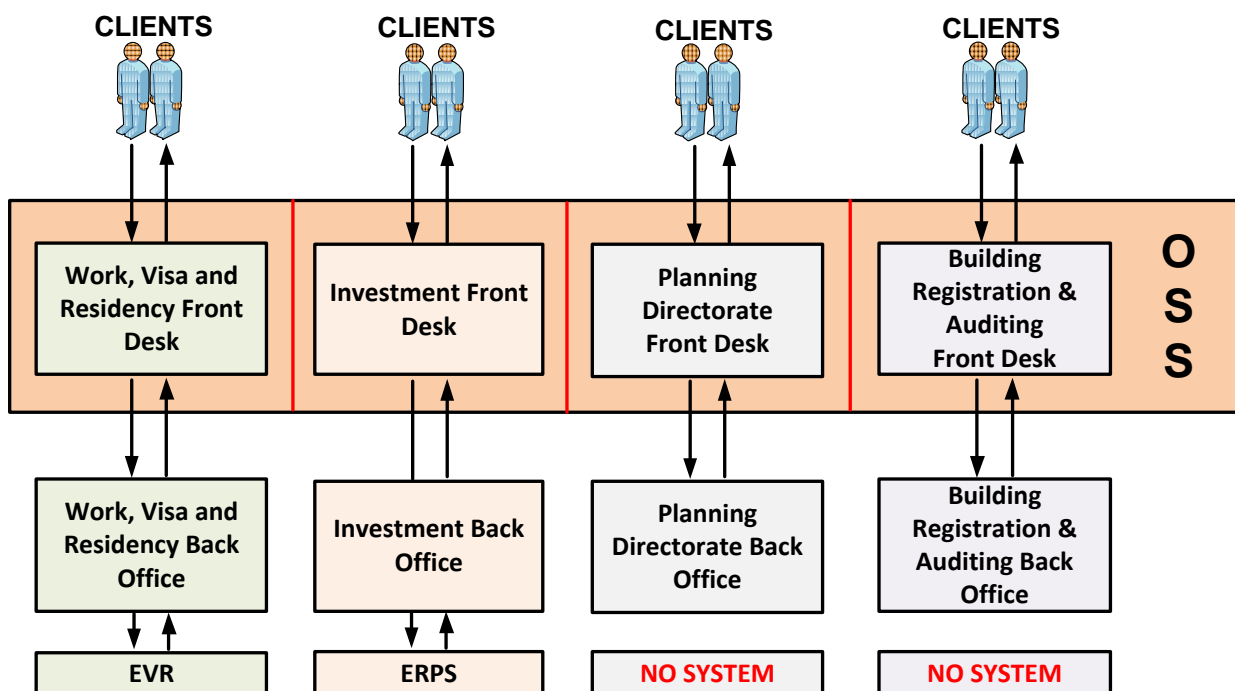
- Planning and Studies Directorate
- Constructions Control and Licensing Directorate

As of October 2010 the Labor, Visa and Residency Directorate was using the EVR system to log its service requests and conduct the service of their clients. The Investment Directorate uses the ERPS system to log and manage and fulfill their service requests. These two systems do not fully cover the processes of their Directorates and will eventually need to be upgraded to comply with the changes that have taken place over time. The customer services which the Labor, Visa and Residency Directorate and Investment Directorate provide fulfill the following service requests:

#	Directorate	System	Service (Process) Name – Arabic
1	Investment Directorate	ERPS	تسجيل المؤسسات في المنطقة
2	Investment Directorate	ERPS	تجديد تسجيل مؤسسة في المنطقة
3	Investment Directorate	ERPS	تعديل شهادة تسجيل مؤسسة مسجلة
4	Investment Directorate	ERPS	الغاء تسجيل مؤسسة مسجلة في المنطقة
5	Investment Directorate	ERPS	اصدار تصريح مباشرة عمل
6	Investment Directorate	ERPS	تجديد تصريح مباشرة العمل
7	Investment Directorate	ERPS	الغاء تصريح مباشرة العمل
8	Investment Directorate	ERPS	اصدار شهادات المنشأ
9	Investment Directorate	None	اصدار تصاريح يومية ومؤقتة لداخل وخارج البلاد
10	Investment Directorate	None	الموافقة على استبدال هياكل المركبات
11	Investment Directorate	None	الموافقة على نقل الملكية للمركبات
12	Investment Directorate	None	الموافقة على شطب واستبدال المركبات
13	Investment Directorate	None	الموافقة على اصدار كرت اتجاه للمركبات العمومية
14	Investment Directorate	None	الموافقة على تحويل واستبدال للمركبات العمومية
15	Investment Directorate	None	الادخال المؤقت للمركبات في منطقة العقبة الاقتصادية الخاصة
16	Investment Directorate	None	الادخال المؤقت للمركبات لغاية المعارض والمتاجرة بها
17	Investment Directorate	None	تجديد الادخال المؤقت للمركبات في المنطقة
18	Investment Directorate	None	الادخال المؤقت للدراجات الالية
19	Labor, Visa and Residency Directorate	EVR	اصدار تأشيرة زيارة او عبور
20	Labor, Visa and Residency Directorate	EVR	تجديد تأشيرة زيارة
21	Labor, Visa and Residency Directorate	EVR	اصدار اذن اقامة
22	Labor, Visa and Residency	EVR	اصدار تأشيرة عمل

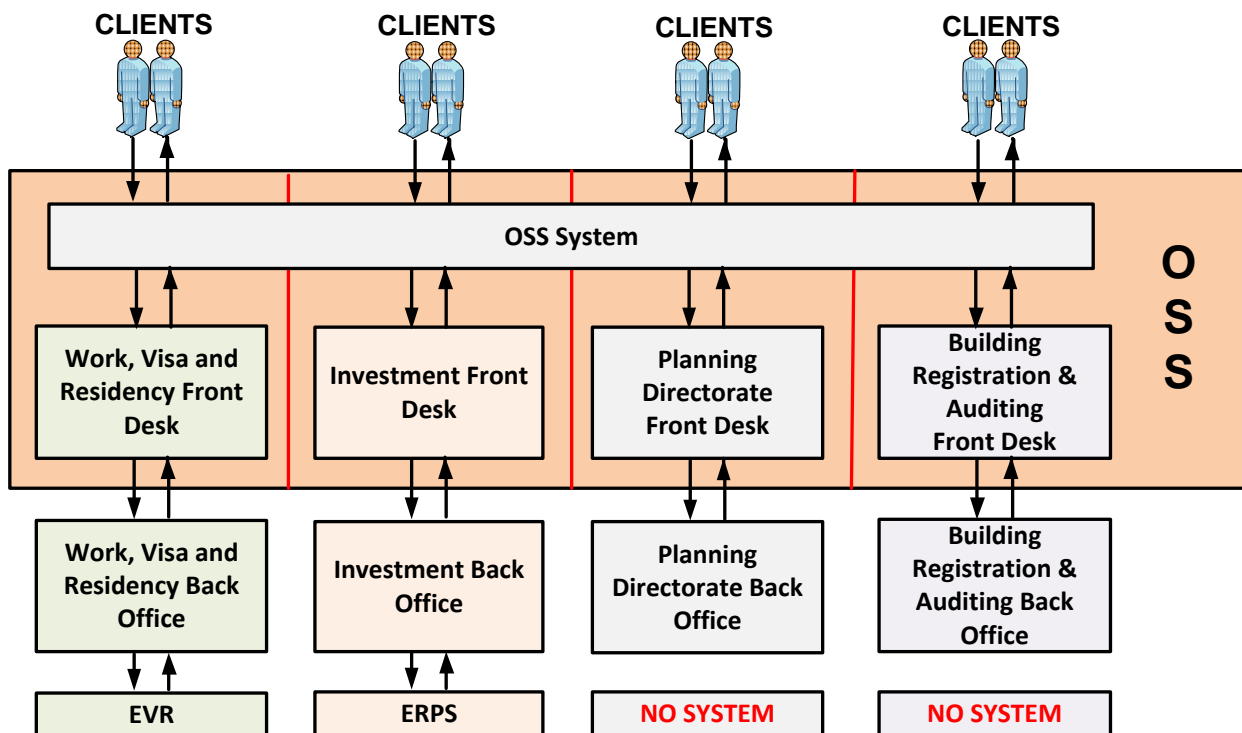
#	Directorate	System	Service (Process) Name – Arabic
	Directorate		
23	Labor, Visa and Residency Directorate	EVR	اصدار تصاريح عمل
24	Labor, Visa and Residency Directorate	EVR	تجديد تصاريح عمل

The current pilot OSS is the centre where the service requests are submitted by the clients, initiated by each directorate's service representatives as a front desk which is located at the OSS and fulfilled by the same directorate's back office. Each directorate's service representative provides services with limited interaction with other representatives from the other Directorates. This implementation can be described as a one door service centre or one roof service centre but not a full OSS. Also in terms of business service management and fulfillment applications, each directorate service representatives in the pilot OSS kept using regular service management applications to record and track the service requests that they initiate. The pilot OSS is still implemented currently at ASEZA. The following diagram illustrates the situation at the current pilot OSS.



**OSS Pilot Site
March 2010 – October 2010**

Within the same context, the MIS Directorate at ASEZA started producing an OSS application that would help the customer service staff at the OSS log the progress of the customer service orders. Also its objective is to provide informative reporting to the service centre management and ASEZA’s high management about the performance of the OSS in terms of service quality. This newly produced system was implemented in September 2010 and is called the OSS. It is based on a Microsoft SharePoint technology and it uses Nintex technology as a workflow engine. This system can be imagined as a thin layered application that is sitting on the top of the existing applications currently used in the OSS pilot site (EVR & ERPS). The main objective is to give the customer service representatives in the pilot OSS unified screens that would allow any service representative from any directorate to log the service request of any directorate within the OSS pilot site. In other words, an OSS organization unit will be initiated with representatives that will be serving in the place of each Directorate’s front desk, all representatives will be using the same OSS system and all will be serving the customers of the four OSS Directorates at the same time.



**OSS Pilot Site & OSS System
November 2010**

The initial plan is to maintain the ASEZA OSS in-house developed system until the CRM system takes over its tasks. There will be no need to keep the ASEZA OSS system after the new CRM is fully implemented. Still during implementation of the new CRM system, a solid transition plan from ASEZA OSS system to the new CRM should be developed and followed while implementing the rollout of the CRM system, this should take place while designing the change management process during the CRM Implementation project.

AWAD Phase I Project

Within the framework of improving customer services and automating the internal processes at ASEZA, the MIS team at ASEZA started implementation of the AWAD system. It incorporates the following systems:

- **Workflow Management System:** a system that manages and defines a series of tasks within an organization to produce a final outcome or outcomes. Workflow Management Systems allow the definition of different workflows for different types of jobs or processes while eliminating or minimizing the use of paper.
- **Document Management System (DMS):** a system that is used to track and store electronic documents and/or images of paper documents.
- **DiWAN:** a set of integrated programs that manage the incoming and outgoing communications in ASEZA, it handles the internal diversion of documents in a secure manner.
- **Geographical Information System (GIS):** a set of tools that capture, store, analyze, manage, and present data that are linked to locations. GIS is the merging of cartography, statistical analysis, and database technology.
- **Portal:** the web interface of AWAD, all the features of the AWAD system are accessed through this interface, a collaboration tool for all the employees of ASEZA. Its web platform will also be used to publish e-services that are related to the infrastructure directorate.

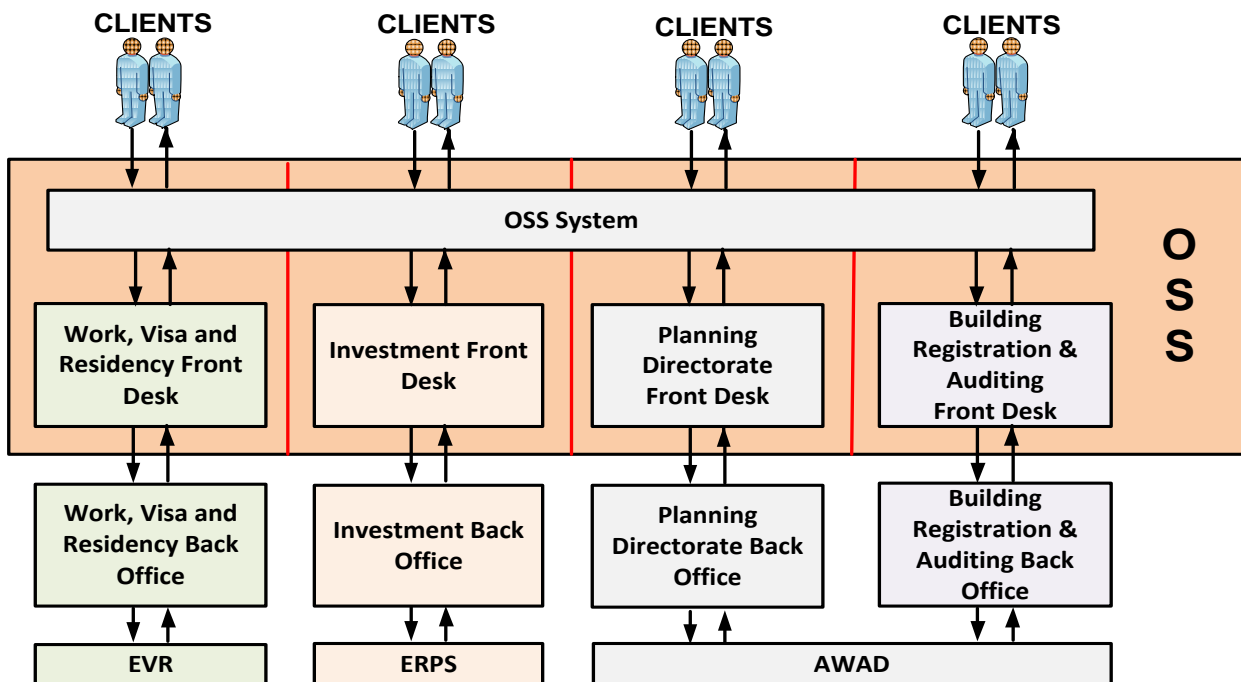
Within the scope of the AWAD Phase I project, an agreement with the delivering company was reached to electronically scan one million paper documents, archive them and link these e-docs to the DMS part of AWAD so that it can be easily accessed once needed.

AWAD Phase I project was launched in the first quarter of 2009 and will be delivered by the end of December 2010. Within the framework of this phase of the project, 30 customer service processes are automated and will be delivered as 30 e-services on ASEZA's website. These services cover the customer service processes in both the Planning Directorate and the Building Registration & Auditing Directorate. These services are:

#	Directorate	System	Service (Process) Name – Arabic
1	Planning and Studies Directorate	AWAD I	تسجيل الأراضي
2	Planning and Studies Directorate	AWAD I	تنازل عن أرض
3	Planning and Studies Directorate	AWAD I	إصدار شهادة تخصيص
4	Planning and Studies Directorate	AWAD I	طلب إفراز /توحيد أرض
5	Planning and Studies Directorate	AWAD I	إصدار مخطط موقع تنظيمي
6	Planning and Studies Directorate	AWAD I	فك رهن
7	Planning and Studies Directorate	AWAD I	إجراء أعمال مساحية

#	Directorate	System	Service (Process) Name – Arabic
8	Planning and Studies Directorate	AWAD I	طلب الحصول على المعلومات الجغرافية
9	Planning and Studies Directorate	AWAD I	دراسة المشاريع الخاصة
10	Planning and Studies Directorate	AWAD I	طلب تعديل أحكام تنظيم
11	Constructions Control and Licensing Directorate	AWAD I	الاعتراض على قرارات تنظيمية
12	Planning and Studies Directorate	AWAD I	تنظيم وتخطيط المواقع
13	Planning and Studies Directorate	AWAD I	تملك الأشخاص المعنويين للأموال غير المنقولة
14	Planning and Studies Directorate	AWAD I	تملك الأشخاص الطبيعيين غير الأردنيين للأموال المنقولة
15	Planning and Studies Directorate	AWAD I	التحري عن وقوعات الأراضي
16	Planning and Studies Directorate	AWAD I	طلب استئجار/بيع قطع أرض(الموافقة على شراء أو استئجار قطع أرض)
17	Constructions Control and Licensing Directorate	AWAD I	إذن أشغال
18	Planning and Studies Directorate	AWAD I	إصدار مخطط موقع تنظيمي
19	Constructions Control and Licensing Directorate	AWAD I	الموافقة على المخططات الأولية
20	Constructions Control and Licensing Directorate	AWAD I	الموافقة على المخططات التفصيلية وإصدار رخصة إنشاء لبناء قائم
21	Constructions Control and Licensing Directorate	AWAD I	الموافقة على المخططات التفصيلية وإصدار رخصة إنشاء لبناء مقترح
22	Planning and Studies Directorate	AWAD I	الموافقة على المشاريع الخاصة
23	Constructions Control and Licensing Directorate	AWAD I	الموافقة تنظيمياً على تصاريح العمل
24	Constructions Control and Licensing Directorate	AWAD I	الاعتراض على قرارات الترخيص ومراقبة الأعمال
25	Constructions Control and Licensing Directorate	AWAD I	إذن صب
26	Constructions Control and Licensing Directorate	AWAD I	إخطار تنفيذ
27	Constructions Control and Licensing Directorate	AWAD I	إعادة تأميمات أبنية و أنقاض
28	Planning and Studies Directorate	AWAD I	إفراز شقق
29	Constructions Control and Licensing Directorate	AWAD I	تصريح مباشرة عمل/ بناء
30	Planning and Studies Directorate	AWAD I	تعديل الاستعمال التنظيمي/أحكام الأعمار

Once AWAD Phase I is fully implemented, it will be integrated with the OSS system so that all the customer service representatives in the OSS site will be logging all the services in both the Planning Directorate and the Building Registration & Auditing Directorate through the OSS system.



**OSS Pilot Site, OSS System & AWAD
December 2010**