



## **Request for Tender: CRM Audit and Data Strategy Development**

### **Background Information**

The Asthma Society of Ireland is the national representative body for people with asthma in Ireland, advocating for the approximately 450,000 people living with the condition. As a not-for-profit organisation operating for over 50 years, our mission is to ensure that everyone with asthma in Ireland can live a full life, symptom-free.

We are currently seeking proposals from vendors experienced in Salesforce for the charity sector to conduct a CRM audit and develop a data strategy. Our organisation has been using Salesforce for 15 years across our Patient Services, Fundraising, and Finance teams, but due to inconsistent processes and a lack of integration, our data is in need of restructuring. We require an assessment of our current setup and a strategic plan to ensure our CRM meets our evolving needs.

### **Closing Date**

28/02/2025

### **Contact Details**

For any queries, please contact:

Phaedra Vlahos

Email: [Phaedra.vlahos@asthmasociety.ie](mailto:Phaedra.vlahos@asthmasociety.ie)

### **Project Budget**

€3,500 (inclusive of VAT)

### **Project Timeline**

Completion by end of March 2025

### **Scope of Work**

We require support for:

- **CRM Audit:** Reviewing our current Salesforce setup, identifying gaps, and assessing whether it meets our needs.
- **Data Strategy Development:** Recommendations on CRM improvements, potential system integrations, and best practices for data management.
- **Training:** Ensuring CRM users have clear guidelines and documentation for clean and reliable data management.

### **Proposal Requirements**

Interested vendors should include the following in their proposal:

- Overview of the company and relevant experience
- Approach to meeting project objectives
- Brief outline of the proposed strategy

- Timeline from project kickoff to completion
- Team details
- Pricing with line-item breakdown (including VAT) and payment schedule
- Terms & Conditions

**Evaluation Criteria**

Proposals will be evaluated based on the vendor's experience, portfolio, proposed approach, team expertise, and cost.

**How to Apply**

Please submit your proposal by 28/02/2025 to [Phaedra.vlahos@asthmasociety.ie](mailto:Phaedra.vlahos@asthmasociety.ie)