



**JAMPRO**  
TRADE & INVESTMENT JAMAICA

## **CLARIFICATION #3**

to

# Bidding Documents

*Issued on:  
March 10, 2020*

for

## **SUPPLY OF A CLIENT RELATIONSHIP MANAGEMENT (CRM) SOFTWARE**

# Ref No: CI-2020-02

## Procuring Entity: JAMAICA PROMOTIONS CORPORATION (JAMPRO)

March 27, 2020

The Jamaica Promotions Corporation (JAMPRO) hereby informs all prospective bidders of the following clarifications to the captioned bidding documents issued on March 10, 2020:

### **Clarifications hereby issued for the following point numbered 10:**

10. Can JAMPRO provide workflow(s) required for solution?

[An overview of some of JAMPRO's workflows have been included below.](#)

#### 1. Key Business Terms

Business terms that are key in the use of the system are defined as follows:

Business Term	Definition	Business Rule
<b>Contact</b>	There are 2 type of contacts – Individual and Company	The user must select one. If type of contact selected is Individual, input of company name is not mandatory. Names of key persons, their positions and roles must be input if type of contact selected is Company.
<b>Origin of Contact</b>	Origin of contact are as follows: <ul style="list-style-type: none"><li>• Telephone</li><li>• E-Mail</li><li>• In-market broker</li><li>• Trade show</li><li>• Conference</li><li>• Inward Mission</li><li>• Outward Mission</li><li>• Cold Call</li><li>• Walk-in</li><li>• Online</li><li>• Referral</li></ul>	
<b>Company</b>	Types of companies: <ul style="list-style-type: none"><li>• Recruitment Agency</li><li>• Exporter</li></ul>	This is to be a drop-down list of the types of companies with the option

Business Term	Definition	Business Rule
	<ul style="list-style-type: none"> <li>• Custom Broker/ Freight Forwarder</li> <li>• Distributor</li> <li>• Local Supplier</li> <li>• Overseas Buyer</li> <li>• Educational Institution</li> <li>• Investor</li> <li>• Film Production</li> <li>• Animator</li> <li>• Music Production</li> <li>• Food Service</li> <li>• Joint Venture Seeker</li> <li>• Other</li> </ul>	to select more than one type of company.
<b>Role</b>	<p>There are 5 role types associated with individuals used by JAMPRO:</p> <ol style="list-style-type: none"> <li>1. Connector - A well-connected/resourced individual who can facilitate access to persons/resources.</li> <li>2. Influencer - An influencer is a person who is well-connected and is regarded as influential and in-the-know; someone who is looked to for advice, direction, knowledge and opinions.</li> <li>3. Decision Maker – Person who has the authority to make decisions.</li> <li>4. Sponsor – Person who approves and/or provides funding and has a vested interest in success of the project.</li> <li>5. Agent – A representative of an individual or company seeking to conduct business.</li> </ol>	The user must identify the role of the contact and should have the ability to select more than one role.
<b>Sector and Sub-sector</b>	<p>Sectors and sub-sectors of focus are:</p> <ul style="list-style-type: none"> <li>• Tourism <ul style="list-style-type: none"> <li>- <i>Medical</i></li> <li>- <i>Leisure</i></li> <li>- <i>Attractions</i></li> </ul> </li> <li>• Education Services</li> <li>• Global Services <ul style="list-style-type: none"> <li>- <i>Outsourcing</i></li> <li>- <i>Digital Services</i></li> </ul> </li> <li>• Logistics <ul style="list-style-type: none"> <li>- <i>Warehousing</i></li> <li>- <i>Transshipment</i></li> <li>- <i>Bunkering</i></li> <li>- <i>Dry Dock Services</i></li> <li>- <i>Ship Chandlery</i></li> <li>- <i>Other</i></li> </ul> </li> </ul>	<p>These are to be drop-down lists where the area of interest expressed is selected and each sub-sector list is determined by sector selected. The user should be able to select more than one option.</p> <p>When other selected, should have an associated editable text field.</p>





Business Term	Definition	Business Rule
	<ul style="list-style-type: none"> <li>• Infrastructure <ul style="list-style-type: none"> <li>- Residential</li> <li>- Commercial – Global Services</li> <li>- Commercial - Special Economic Zones</li> <li>- Commercial - Other</li> </ul> </li> <li>• Agribusiness <ul style="list-style-type: none"> <li>- Fresh Produce</li> <li>- Agro-Processing</li> </ul> </li> <li>• Non-Food Manufacturing <ul style="list-style-type: none"> <li>- Chemicals</li> <li>- Electronics</li> <li>- Medical Devices</li> <li>- Furniture</li> <li>- Cosmetics</li> <li>- Packaging</li> <li>- Pharmaceuticals</li> <li>- Assembly</li> <li>- Other Light Manufacturing</li> </ul> </li> <li>• Energy <ul style="list-style-type: none"> <li>- Solar</li> <li>- Wind</li> <li>- Hydro</li> <li>- LNG</li> <li>- Oil</li> </ul> </li> <li>• Mining <ul style="list-style-type: none"> <li>- Limestone</li> <li>- Bauxite</li> <li>- Other</li> </ul> </li> <li>• Film, Animation and Music (FAM) <ul style="list-style-type: none"> <li>- Feature Film</li> <li>- Documentary</li> <li>- Television Series</li> <li>- Television Commercial</li> <li>- Webisode</li> <li>- Short Film</li> <li>- Other</li> </ul> </li> <li>• Other</li> </ul>	
<b>Segment</b>	This is as a further breakdown of sub-sector into product/ service category	This should be an editable text field in the system.
<b>Status</b>	<ol style="list-style-type: none"> <li>1. Active – Opportunity currently being pursued</li> <li>2. Lost – Opportunity no longer exists due to clients’ decisions</li> <li>3. Stalled – Opportunity still exists however is on hold due to challenges</li> </ol>	Status should be indicated during the client engagement stages Qualified Lead, Prospect and Project and are applicable to all stages. Except for active status,


<b>Business Term</b>	<b>Definition</b>	<b>Business Rule</b>
	and stakeholders are actively working to resolve 4. Dormant – There is no/ sporadic interactions with JAMPRO (inactive) 5. Closed – Company is closed	reason(s) for the status must be input in the system.
<b>Client Engagement Stages</b>		
<b>Lead</b>	An Individual or Company indicates that there is an investment opportunity to be pursued or has expressed an interest in sourcing goods/services.	To be classified as Investment, Export – Products or Export – Services. See additional criteria for classification below.
<b>Qualified Lead</b>	Jamaica is being considered as the location for doing business or sourcing goods/ services.	To be classified as Investment, Export – Products or Export - Services. See additional criteria for classification below.
<b>Prospect</b>	Project or product feasibility is being determined.	To be classified as Investment, Export – Products or Export – Services. See additional criteria for classification below.
<b>Sale Secured</b>	Firm commitment given to investing in or securing goods/ services from Jamaica in the near term.	To be classified as Investment, Export – Products or Export – Services. See additional criteria for classification below.
<b>Post-Sale Facilitation</b>	Provision of business facilitation services for investment projects and re-orders generated for export.	To be classified as Investment, Export – Products or Export – Services

## 2. Sales Progression Criteria




In addition to the definitions of client engagement stages above, the following criteria must be met to categorize clients in the relevant stage. In using the system, criteria met should be selected and used as triggers to move to the subsequent stage. Based on sale type selected, i.e. Investment, Export – Products and Export – Services, only criteria relevant to that type of sale should be shown as options for the user to choose from.



### 4.1. Investment Sales Progression Criteria

		Criteria					
		1	2	3	4	5	6
<b>Contact</b>							
	Criteria needed to progress	Validated expression of interest*					
<b>Lead</b>							
	Criteria needed to progress – Mandatory criteria required	Jamaica is being considered*	Project Synopsis has been submitted*	Business issue identified*	Identify decision maker		
<b>Qualified Lead</b>							
	Criteria needed to progress – Mandatory criteria required	Site visit/ inward mission has been conducted*	Basic due diligence completed favourably*	Meeting with relevant government stakeholders	Meeting with potential private sector stakeholders	A Business/ Financial Plan/ Budget is submitted	Identify decision maker*
<b>Prospect</b>							
	All criteria needed to progress	Financing has been secured*	Business registration completed*	Introduction to Project Implementation Department*	A location has been secured*	Projected capital expenditure and/or jobs provided*	Mutual Plan agreed*
<b>Sale Secured</b>							




	Criteria					
	1	2	3	4	5	6
 Mandatory criteria needed to progress	Services are still being facilitated by JAMPRO	Project is fully operational in Jamaica*	Client may still be growing and capable of reporting Capital Expenditure and Jobs	Possibility of reinvestment in the future	Business approvals in place	Assets purchased/ leased
<b>Post Sale Facilitation</b>						

#### 4.2. Export – Products Sales Progression Criteria


	Criteria					
	1	2	3	4	5	6
<b>Contact</b>						
 Criteria needed to progress	Validated expression of interest by buyer*					
<b>Lead</b>						
 Criteria needed to progress	Product details submitted*	Business issue identified *	Potential supplier/exporter identified *	Identify decision maker		
<b>Qualified Lead</b>						
 Criteria needed to progress	Basic due diligence completed favourably*	Buyer and exporter introduced to each other*	Sample requested/ provided	Product specifications shared*	Identify decision maker*	
<b>Prospect</b>						

	Criteria					
	1	2	3	4	5	6
 Criteria needed to progress	Order confirmed in writing*	Price agreed*				
<b>Sale Secured</b>						
 Mandatory criteria needed to progress	Goods shipped*	Services are still being facilitated by JAMPRO	Reorder request may be received			
<b>Post Sale Facilitation</b>						

#### 4.3. Export – Services (FAM, ITES et al) Sales Progression Criteria

	Criteria					
	1	2	3	4	5	6
<b>Contact</b>						
 Criteria needed to progress	expression of interest by buyer					
<b>Lead</b>						
 Criteria needed to progress	Jamaica is being considered*	Project synopsis/ service requirements submitted*	Business issue identified*	Identify decision maker	Potential service provider identified*	
<b>Qualified Lead</b>						
 Criteria needed to progress	Basic due diligence completed favourably*	Jamaican service provider and client introduced to each other*	Site visit/ inward mission undertaken	Identify decision maker*	Service capabilities demonstrated	



	Criteria					
	1	2	3	4	5	6
<b>Prospect</b>						
 Mandatory criteria needed to progress	Contract signed*	Services are still being facilitated by JAMPRO				
<b>Sale Secured</b>						

