Request for Proposals - Salesforce Consultancy

RFP n#:	2025-6-FS-SFCONSULTANT
Location:	Remote, must be able to operate in GMT and IST time zones.
Start date:	15 August 2025
End date:	6 months with intention for 2 years

Better Cotton key contact:
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IT & Data

All applications must be submitted via this form.
You may submit questions to tender@bettercotton.org - RFP n# "2025-6-FS-SFCONSULTANT" until 4th July 2025.

Questions, requests and applications sent after the deadline (13th July 2025) will only be considered in exceptional circumstances.

AT THE END OF THIS DOCUMENT, THERE IS A QUESTION AND ANSWER SECTION WHICH YOU ARE ENCOURAGED TO GO THROUGH IN PREPARATION FOR SUBMITTING YOUR BIDS

Description

Better Cotton is the world's largest cotton sustainability programme. Our mission: to help cotton communities survive and thrive, while protecting and restoring the environment. In difficult times, we are meeting the challenge head on. Through our network of field-level partners we have provided training on more sustainable farming practices to more than 2.9 million cotton farmers in 26 countries. More than a fifth of the world's cotton is now grown under the Better Cotton Standard and our membership network includes more than 2,400 members.

More information about Better Cotton can be found on our website: www.bettercotton.org

Background

We are seeking proposals from skilled organisations interested in supporting the work of our IT & Data function, specifically the IT Services Team (IST)'s Customer Relationship Management (CRM) workstream.

IST are responsible for maintaining and enhancing our technological infrastructure. This includes overseeing the development and management of software applications, ensuring data integrity, and providing technical support to all staff members. The team plays a pivotal role in driving digital transformation within the organisation.

We use Salesforce to support our CRM workstream. The platform is integral to our mission, aiding in the efficient management of donor relations, program implementation, and stakeholder engagement.

Our organisation is operating primarily on Sales and Experience clouds with plans to enable Service Cloud later this year. We are also considering developments to improve fundraising capabilities (major donors), training delivery, event management and marketing.

Other tools in our stack linked to the CRM workstream:
- Certinia
- ChainPoint
- Conga
- Expensify
- FormAssembly
- Gearset
- Microsoft 365 (Teams, SharePoint, PowerBI etc.)
- Mailchimp
- Moodle
- Own
- Trakstar
- WordPress

Scope of Work

Our intention is to identify a long term service provider with a likely initial contract of 6 months and based on performance could be extended to an additional 2 years.

As we continue to grow our network it is pivotal that the CRM workstream is prepared to scale. The expected output from this consultancy will be:

1. **Managed Services:** The consultant will act as a soundboard for strategic decisions and serve as Level 3 support for complex issues. Responsibilities will include:

a. Providing expert advice on the strategic use of Salesforce clouds and features within Better Cotton.
b. Assisting with troubleshooting and resolution of issues that cannot be addressed by in-house support.

2. **Development Services:** The consultant will act as both the project manager and developer for mutually agreed-upon projects. Responsibilities will include:
   a. Collaborating with Better Cotton's IT Services Team to define project requirements and deliverables.
   b. Developing custom Salesforce solutions to meet specific organisational needs.
   c. Conducting rigorous testing and quality assurance to ensure the reliability and effectiveness of new developments.
   d. Thoroughly documenting all new development and improvements.

In addition to skills, competencies and expertise, we will consider value for money and demonstrable commitment to the sustainability field to evaluate applications.

High-level Timeline

13 July 2025	Applications deadline All applications must be submitted via this form.
14th July to 25 July 2025	Applications review & shortlisting / Interviews
28 July 2025	The successful applicant will be notified Unsuccessful shortlisted applicants will also be notified
15 August 2025	Start of the consultancy

Required Skills & Knowledge

Skills, Knowledge and Experience
Essential
10+ Years of experience in Salesforce Development
Excellent proficiency in Sales, Service, and Experience Clouds development
Understanding of non-profit sector needs
Fluent in English

Be consistently available in IST and GMT/BST time zones
Optional
Strong experience integrating Microsoft 365 suite of tools with Salesforce
Strong understanding in Non-profit and Marketing Clouds development
Proficiency in Certinia and other tools in the tech stack (listed above)

Application Requirements

Please note that we have changed our RFP submission protocol, and this is now in two phases;

- Phase 1: Initial details will be submitted on the form found in this link.
- Phase 2: You will receive an email with live links to upload relevant documents (please check your Spam and Junk folders)

Proposals responding to this Request for Proposals should be a maximum of 10 pages (excluding CVs), and include the following:
- Overview of relevant experience
- Proposed methodology and timeline
- Detailed and transparent budget, in EUROS, including time allocation and day rates

We thank all applicants for their interest; however only shortlisted applicants will be contacted.

Better Cotton is committed to good practice and transparency in the management of natural, human and financial resources. All applications will be reviewed under the principles and subject to Better Cotton's policies on equal opportunity, non-discrimination, anti-bribery & corruption and conflict of interest.

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

Technical Evaluation Criteria
- Demonstrated understanding of this RFP
- Quality and clarity of the proposed approach and methodology
- Feasibility of the proposed activity plan and timeline, and appropriateness of time allocated to delivering each task
- Relevant professional experience of the proposed consultant(s)
- Quality and relevance of the sample work submitted

Financial Evaluation Criteria
- Quality and clarity of budget provided, and level of detail included
- Alignment of the budget to the activity timeline detailed in the technical proposal
- Value for money
- Adherence to the available budget

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Questions & Answers

Question 1

Can you share more detailed use cases or backlog items for the initial 6 months?

Answer

While these items are not guaranteed to move forward, they should provide an idea of the projects we are currently considering:

I. **System-wide Documentation:** Creating comprehensive documentation for all system components to ensure clarity and ease of use.

II. **Integration with M365:** Developing and implementing integration solutions with Microsoft 365 to enhance productivity and collaboration.

III. **Architecture Review:** Conducting a thorough review of the system architecture, focusing on custom objects and accounts, to identify areas for improvement.

IV. **Scoping and Assessment of Marketing Cloud's Potential:** Evaluating the potential benefits and feasibility of integrating Marketing Cloud into our existing systems.

V. **Enabling and Onboarding Fundraising Workstreams:** Setting up and integrating new fundraising workstreams to support our organizational goals.

Question 2

What percentage of the effort is expected for support vs. Development?

Answer

The allocation of effort between support and development will vary from month to month. However, you can generally expect the majority of the effort to be focused on development, with an approximate split of 20% for support and 80% for development.

Question 3

Is there a target budget or range that Better Cotton wants vendors to stay within for the initial 6-month engagement?

Answer

To ensure value for money, we would like to see how much each applicant budgets for the proposal. Please use your cost estimations for similar projects to provide us with an estimated cost.

Question 4

Could you describe your current approach to incident escalation and resolution within Salesforce?

Answer

Our CRM team follows the wider IT & Data framework and adheres to established SLAs for support. The process is as follows:

Issue Reporting: Users report issues and change requests through the ticketing system (Dynamics).

Triage and Resolution: Our team triages the tickets for resolution based on their impact and effort required:

  I.   **L1 (Low Effort/Impact):** These tickets are resolved within the SLA through the ticketing system.

  II. **L2 (High Effort/Impact):** These tickets are escalated to the team's roadmap for broader investigation and resolution.

  III. **L3 (Consultant):** If in-house knowledge or availability is insufficient to resolve the issue, we escalate to external consultants.

Question 5

For Level 3 support, do you anticipate primarily recurring complex technical issues, or are you more focused on strategic guidance and best practices?

Answer

Our approach to L3 support primarily involves addressing complex, unknown, or uncommon technical issues. Given that our in-house team is relatively new to the organization and our systems are highly customized and largely undocumented, we leverage L3 support to access the expertise of seasoned professionals when needed. However, as our team continues to grow and gain experience, these complex issues have become less frequent. Consequently, we are increasingly focusing on strategic guidance and best practices, shifting from a reactive to a more proactive approach.

Question 6

Can you provide an overview of your current Salesforce setup—including the number of users, key objects, customizations, and major integrations?

Answer

a. Our Salesforce setup includes:
  i. Users:
     - 250 internal users (Sales and Service Clouds)
     - Approximately 1,000 external users (Experience Cloud)

  ii. Key Objects:
     - Accounts
     - Contacts
     - Opportunities
     - Several custom objects

iii. Integrations:

     - 3 major integrations
     - 1 minor integration

Worth noting, our organization faces considerable technical debt due to legacy packages,

depreciated business processes, and other inefficiencies.

Question 7

Are there any specific pain points or critical issues in your existing Salesforce environment or integrations that you would like us to prioritise?

Answer

The organisation is going through a period of considerable change. Our main goal is to be able to respond to the immediate needs of our stakeholders while addressing the foundational improvements necessary to scale and remaining strategic about the future.

Question 8

What type of managed services provider do you seek (small, agile and nimble or large, experienced and structured)? Would you prefer to work with a supplier recommended by the Salesforce Partner Network and Non-Profit Salesforce Team, or are you open to consider a smaller supplier outside of Salesforce's normal recommended partners?

Answer

We are considering all types of suppliers.

Question 9

Did you envisage that this opportunity would result in the creation of a new team, or is the opportunity more about one or maybe maximum two consultants?

Answer

We have an existing internal team. This RFP is for consultants to cover work the internal team needs additional support on.

Question 10

Have you discussed your scope/approach with the Salesforce Non-Profit team? Have you created an organisational operating model that outlines the ongoing cost / number of team members once the project completes?

Answer

Our Salesforce Org has been established for some time. The work in scope for this consultancy responds to the growing demand for change within the organisation.

Question 11

Is this a 5k EUR, EUR 50k EUR or EUR 500k EUR opportunity? Do you have a "not-to-exceed" budget number or "ceiling price" for this engagement?

Answer

To ensure value for money, we would like to see how much each applicant budgets for the proposal. Please use your cost estimations for similar projects to provide us with an estimated cost.