The American Chamber
of Commerce in Jordan

The American Chamber of Commerce in Jordan
(AmCham – Jordan)
REQUEST FOR PROPOSALS (RFP)
Within the scope of
The Informal Livelihoods Advancement Activity (Iqlaa)
funded by the United States Government

RFP #	7/2026
Name:	Request for Proposals: Customer Relationship Management System (CRM) for One Pre-Selected Aggregator
RFP Date of Issuance:	Wednesday November 4th, 2026
Deadline to receive Questions:	Sunday November 8th , 2026
Deadline to answer Questions:	Tuesday November 10th, 2026
Closing Date/Time for Submitting the Proposals:	Monday November 16th, 2026 Technical and financial offers with respect to this RFP should be sent in separate attachments by email to amcham@amcham.jo.
Proposals Submission Method:	Interested Jordanian companies are encouraged to submit their technical and financial proposals as per the details provided in this RFP with the requested attachments. Interested candidates shall provide: A technical proposal that reflects an understanding of the requirements of the contract and a clear outline of the methodology to be used. Maximum number of pages for the Technical proposal is 10 pages/ font size 11 and in PDF format. Kindly use the attached application form. Proposals are to be submitted in English. A financial proposal in JOD to be submitted in a separate document. Mandatory Annexes must provide the supporting documents requested in the RFP, and should be organized for easy reference. (see the "Mandatory Annexes" section) To be sent by email to: amcham@amcham.jo with the subject line:

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	RFP – CRM Services for One Pre-Selected Aggregator The 10-page limit applies to the main technical proposal only and excludes the cover page, signed cover letter, work plan, CVs, portfolio evidence, financial proposal, and other mandatory annexes.
Date for Opening Proposals:	Tuesday November 17th, 2026
Anticipated Date for final selection:	Wednesday November 25th, 2026
Contract Duration	**8-week implementation** period followed by a minimum three-month post-launch warranty and technical support period

Important Note: *Issuance of this RFP under the Iqlaa Program does not constitute an award commitment by AmCham-Jordan or an obligation to reimburse any cost incurred in preparing or submitting a proposal. AmCham-Jordan reserves the right to accept or reject any or all proposals, cancel or amend the solicitation, request clarifications, or negotiate with one or more bidders, in accordance with applicable procedures. Proposals are submitted at the bidder's own risk and expense.*

I. INTRODUCTION:

The American Chamber of Commerce in Jordan (AmCham-Jordan) is a non-profit, member-based organization established in 1999, representing over 250 members, 90% of which are SMEs. For years, it has contributed to Jordan's sustainable economic development by supporting business growth and strengthening Jordanian American economic relations. AmCham-Jordan is affiliated with the U.S. Chamber of Commerce in Washington, D.C. and is a member of the AmCham MENA Regional Council.

AmCham-Jordan is one of the implementation partners of the Informal Livelihoods Advancement Activity (Iqlaa), funded by the United States Government. Iqlaa is a five-year program that started in May 2022 and aims to support Jordan's home-based, micro and small businesses to grow, transform, and become resilient to future challenges. Iqlaa's approach explores new ways of doing business and improving access to finance, markets, and services. It focuses on four sectors: agriculture, tourism and hospitality, manufacturing, and services, with a special focus on technology development and implementation. The program encourages and supports the participation of all micro and small business owner segments.

II. CONTEXT OF CONSULTANCY:

As part of the implementation phase of the Aggregator Accelerator Program, AmCham-Jordan seeks proposals from qualified Jordanian companies to assess, configure, and implement a Customer Relationship Management (CRM) solution for one pre-selected aggregator.

The pre-selected aggregator is engaged in AmCham-Jordan's Aggregator Accelerator Program and

works in design, production, retail sales, and e-commerce. It aggregates products from several MSE suppliers from Jordan and sells them locally and regionally both online and through showroom in Amman. It already uses several Zoho applications including Zoho form, Zoho Social and Zoho mail. The assignment will build on its existing systems and approved business needs covering both customer/buyers side and MSE suppliers

The assignment is expected to deliver practical, approved, and usable outputs within 8 weeks, followed by a minimum three-month post-launch warranty and technical support period.

III. SERVICE ALLOCATION

Assess, configure, and implement one Zoho CRM solution for the pre-selected aggregator. The solution shall use properly licensed, scalable software and be configured according to the aggregator's approved requirements, taking account of the aggregator current Zoho applications. and

The solution shall cover both MSE supplier management and customer/client management, enabling the aggregator to maintain comprehensive records for each, including profiles, contact details, products supplied or purchased, relevant documents, and a history of interactions and follow-up activities. All modules and configurations necessary to manage and track relationships on both sides shall be included in the implementation scope.

IV. SCOPE OF WORK:

Task 1. Inception, Assessment, and Work Plan

Timing: Week 1

Activities:

- Hold a kick-off meeting with AmCham-Jordan and the aggregator to confirm requirements, milestones, and deliverables.
- Conduct a focused assessment of the aggregator business model, objective of the adopting the solution, the aggregator's CRM needs, and existing Zoho applications configuration
- Prepare an 8-week work plan showing activities, dependencies, milestones, and the CRM launch.

Deliverables:

- An inception report and an 8-week work plan.

Task 2. CRM Requirements and Solution Design
Timing: Week 2

Activities:
Activities:

- Map the aggregator's MSE supplier management, aggregation activities, and customer/client operations, including workflows, data, users, reporting needs, and existing systems.
- Define user roles, access permissions, approval levels, dashboards, and reports.
- Prepare an integration matrix identifying the existing Zoho applications and other systems to be integrated, data exchanged, integration methods and frequency, dependencies, and responsibilities.
  Prepare a data migration plan identifying data sources, estimated record volumes, data mapping, cleansing responsibilities, migration procedures, and validation and reconciliation methods.
- Recommend the appropriate deployment and licensing model, considering the aggregator's existing Zoho applications and subscriptions.
- Consolidate the functional and technical requirements and proposed configuration into a Solution Requirements Brief (SRB), identifying agreed limitations and referencing the integration matrix and data migration plan.
- Obtain written approval of the SRB, integration matrix, and data migration plan from AmCham and the aggregator before proceeding with Task 3.

Deliverables:

- Approved Solution Requirements Brief (SRB), covering functions, workflows, users, access permissions, dashboards, reports, proposed configuration, deployment, licensing, and agreed limitations.
- Approved integration matrix and data migration plan.

Task 3. CRM Configuration and Implementation
Timing: Weeks 3-5

The CRM solution shall include the applicable functions below, building on the aggregator's existing Zoho applications where appropriate.

- Management of customer, lead, prospect, and business-contact records.
- Lead capture, qualification, assignment, and follow-up.
- Sales pipeline and opportunity management.
- Recording of calls, meetings, emails, notes, and other customer interactions.
- Task, reminder, and follow-up management.
- Customer segmentation and basic marketing-campaign management.
- Custom fields, forms, workflows, notifications, and approval processes.
- Role-based access and user permissions.
- Dashboards and reports (Reports extraction in different and applicable formats) covering leads, opportunities, sales activities, conversion rates, and customer engagement.
- Integration with relevant other software solutions used by the aggregator, email accounts, website enquiry forms, and other approved systems, where technically feasible.
- Import and organization of approved existing customer and sales data.

The technical and financial proposals shall clearly identify any CRM functions that require additional configuration, licensing, localization, or third-party support.

Deliverables

- A configured CRM solution ready for testing.
- Approved existing customer and sales data imported into the CRM, with a migration summary showing the records imported and any unresolved data issues.
- CRM configuration documentation covering functions, workflows, user roles, permissions, dashboards, and reports.

Task 4. Testing, Launch
Timing: Weeks 5–6

Activities:

- Conduct functional, workflow, access-control, integration, data-migration, performance, backup and recovery, and security testing for a minimum of four users.
- Implement and test the following minimum-security requirements:
    - Individual accounts, multi-factor authentication, and role-based access managed by the administrator.
    - Encryption of stored and transmitted data, with secure handling of files and credentials.
    - Audit logs of sign-ins, administrative actions, and record changes, retained for at least 90 days.
    - Daily backups retained for at least 30 days, with documented and tested recovery procedures.
    - Notification to AmCham and the aggregator within 24 hours of discovering a

security incident, followed by corrective actions and updates.
  - Secure handover of data and credentials, removal of contractor access when no longer needed, and deletion of contractor-held data after completion or termination, subject to agreed retention requirements.

- Validate and reconcile migrated data against the approved source records and verify that integrations operate as agreed.
- Document any unresolved discrepancies or limitations for written approval before launch.
- Record and resolve issues affecting acceptance before launch. No critical or high-severity issues shall remain open. Any remaining minor issues shall have an approved resolution schedule.
- Configure the live environment and launch the CRM following written user acceptance by the aggregator and approval by AmCham.

Task 5. User and Administrator Training
Timing: Weeks 5–6, before launch

Activities:

- Deliver practical training for at least four users, tailored to their roles and the approved CRM configuration.
- Cover MSE supplier and customer/client records, leads, opportunities, interactions, follow-up activities, workflows, dashboards, and reports.
- Train designated administrators on user accounts, access permissions, routine configuration, data imports and exports, security settings, and backup and recovery procedures.
- Use practical exercises based on the aggregator's operations to confirm users can perform their assigned tasks before launch.
- Provide user guides, administrator instructions, and any materials reflecting the implemented solution.

Deliverables:

- User guides, and administrator instructions.
- Training brief report (3 pages max).

Task 6. Post-Launch Support, Warranty, Final Reporting, and Handover

Timing: From launch through Week 8 for stabilization, final reporting, and handover, with

warranty and post-launch support continuing for three months after completion of the contract.

Activities:

- Provide three months of technical and user support and warranty at no additional cost, correcting defects and configuration errors against the approved SRB.
- Agree on support channels and response and resolution times, maintain an issue log, and resolve critical and high-severity issues.
- Submit a final report summarizing implementation, testing, migration, training, support.
- Hand over documentation, administrative control, credentials, and licensing details; remove contractor access and delete retained data when no longer required.
- Conduct a final review and obtain the aggregator's written acceptance and AmCham's approval, without ending remaining warranty obligations.

Deliverables:

- Final report and handover package, including licensing, renewal dates, and recurring costs.
- Documented three-month warranty and support terms, with optional support costs thereafter.
- Completed handover checklist and written acceptance and approval.

Ownership and Handover: The aggregator shall retain ownership of its data and administrative control of the deployed solution, including credentials, configurations, and documentation. Any custom-developed components shall be transferred with the rights and materials needed for future modification by the aggregator or its appointed provider. Third-party software remains subject to its licensing terms. Handover shall be validated through a completed checklist, verified administrator access, confirmation of deployment in the aggregator's account, and a demonstration that configurations can be accessed and modified.

V. DELIVERABLES AND ACCEPTANCE

The bidder shall follow the sequence of tasks above. Implementation shall begin after approval of the CRM requirements and configuration brief, and launch shall follow written user acceptance, unless AmCham-Jordan authorizes parallel work in writing.

All deliverables require written acceptance by AmCham-Jordan following validation by the aggregator.

VI. ROLES AND RESPONSIBILITIES

AmCham-Jordan

- Manage the contracting process and overall coordination of the assignment.
- Serve as the formal communication channel between the service provider, the aggregator, and Iqlaa.
- Review and approve work plans, progress, deliverables, and change requests in consultation with the relevant parties.
- Monitor contractual compliance, quality, risks, and adherence to the 8-week timeframe.
- Issue formal acceptance of deliverables and process milestone payments.

Selected Bidder

- Appoint a project manager and provide the qualified team required to deliver the complete scope.
- Implement the assignment according to the approved work plan, requirements, and schedule.
- Maintain the deliverable tracker, and provide concise progress updates.
- Protect all business, customer, platform, and account data and comply with confidentiality and access-control requirements.
- Promptly report any delays, missing inputs, risks, or third-party dependencies affecting delivery.

Aggregator

- Appoint a focal point and participate in assessments, sessions, reviews, testing, training, and approvals.
- Provide or authorize timely access to relevant CRM accounts, email systems, website enquiry forms, and other required services as relevant.
- Submit consolidated feedback and approvals within the agreed review periods.

VII. REQUIRED QUALIFICATIONS

- At least five years of relevant experience in CRM assessment, configuration, implementation, and training.
- Successful completion of at least two comparable CRM assignments, supported by work samples and three client references.
- A team covering CRM configuration, data migration, integrations, quality assurance, training, and project management.
- Ability to deliver approved outputs for one beneficiary within the fixed timeline.

Participation Enablement:

*Kindly go through the participation enablement guiding framework attached to ensure that MSEs/HBBs owned by vulnerable women, men, youth and PLWDs needs are catered for in the event

that they are part of the intervention whether testing the platform or feeding in to the needs of the aggregators, and that you as a bidder adapt

VIII. TIMING & LEVEL OF EFFORT:

The assignment shall be completed within (8) weeks from the contract start date.

IX. COMMUNICATIONS, BRANDING AND MARKING:

As a condition of this RFP, the contracted bidder is required to comply with the Mercy Corps and Iqlaa Branding and Marking requirements.

Any public material developed within this scope of work should be shared with the Iqlaa communications team for branding, marking, and messaging review and approval.

Mercy Corps is rebranding to - Prosper Global - in January. An amended Communications, Branding and Marking Annex reflecting the new identity will be shared in due course.

X. MANAGEMENT & REPORTING:

The bidder will report contractually to AmCham-Jordan through its designated project and contract-management team and will coordinate technical implementation with the aggregator's authorized focal point.

The bidder shall submit concise progress updates at the frequency agreed in the inception report and promptly identify any issue that may affect scope, cost, quality or schedule. All deliverables shall be submitted electronically in English and in editable formats, in addition to PDF versions where requested.

XI. TENDER EVALUATION METHOD:

Proposals will be evaluated according to the following criteria:

Criteria	**Weight**
Technical Weight	**70 pt.**
Technical Approach, Methodology and Understanding of the Assignment	30 pt.
Bidder Technical Expertise & Key Team	25 pt.
Relevant experience and portfolio	15 pt.
Financial Weight	**30 pt.**
Only proposals achieving a minimum technical score of 48 points out of 70 will proceed to the financial evaluation. AmCham-Jordan may request clarification, verify references, or invite shortlisted bidders to present their approach and demonstrate relevant platforms or work samples.	

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of Commerce in Jordan

XII. GENERAL TERMS AND CONDITIONS:

Interested bidders should consider the following terms when preparing and submitting their proposals:

GENERAL TERMS AND CONDITIONS

- AmCham-Jordan may invite shortlisted bidders to present their methodology and proposed implementation approach.
- Award is based on best value, not necessarily the lowest price.
- Prices shall remain valid for at least 90 days and include all professional costs required for the stated scope, except clearly identified exclusions.
- Assignment information is confidential and may be used only for the contracted work. Actual or potential conflicts of interest must be disclosed.
- All paid custom work and deliverables, including designs, media, copy, source files, platform configuration, custom code, documentation, accounts, and access, shall be handed over to the relevant authorized party.
- No platform, domain, account, source file, or essential credential may remain exclusively controlled by the bidder after handover.
- Selected bidder shall not incur extra costs, activate paid subscriptions, change scope, or use unapproved media budgets without prior written approval.
- AmCham-Jordan may reduce, increase, reallocate, or cancel services before contracting or by written amendment, subject to agreed pricing and donor requirements.
- All prices shall be quoted in Jordanian Dinars (JOD), exclusive of sales tax, and shall include all fees required to complete the assignment.
- Payments will be milestone-based and subject to approval of the relevant deliverables. shall propose a payment schedule aligned with the stages included in section V; the final payment schedule will be agreed during contracting.
- The proposal must include all the above requirements in addition to the signed conflict of interest letter provided with this RFP.
- Bidders who fail to submit all the requested documents are automatically disqualified from the evaluation process.

XIII. Mandatory Annexes:

The proposal must include the following clearly labelled annexes:

- Bidder registration and legal-status documents.
- Brief CVs of the proposed key personnel.
- Signed eligibility and conflict-of-interest letter.
- Detailed financial proposal, itemized by CRM activity and cost category, and submitted separately from the technical proposal, using the below template:

The American Chamber
of Commerce in Jordan

Budget Template:

Budget Item	Amount (JOD)
Subscriptions and licenses.	
Development, customization, integrations, configuration, testing, and launch.	
Training, post-development support (including the three-month warranty and support period), and handover.	
Total	