

TENDER REFERENCE: RFP 08-2025

TENDER NAME: THE APPOINTMENT OF A SERVICE PROVIDER FOR A CUSTOMER INSIGHTS PLATFORM FOR A PERIOD OF THREE (3) YEARS.

QUESTION/S	ANSWER
<p>1.1 In terms of training - how many end users will there be to factor for the end user training?</p> <p>1.2 I noticed that the pricing spec has a placeholder for one value - is that placeholder the investment for training per end user or in total?</p>	<p>1.1 There are 50 active end users, which includes both administrative and standard users.</p> <p>1.2 It is recommended that training pricing be presented as a total sum, rather than calculated on a per end user basis.</p>
<p>2. Is the tender deadline going to be extended?</p>	<p>2.1 The tender closing date cannot be extended as the current service provider's contract end 11 October 2025. As such, to ensure continuity of business operations, a new service provider should be appointed in time to complete migration and commence services by 11 October 2025.</p> <p>2.2 Furthermore, the procurement timelines have been strictly followed to ensure that all potential bidders are afforded equal opportunities to submit the necessary tender documentation within the stipulated period.</p>
<p>3. May we kindly ask for a 3-week extension of the RFP for us to respond?</p>	<p>3. Refer to responses – 2.1 & 2.2</p>
<p>4. We would like to enquire whether an extension could be granted for the SARS RFP 08-2025. We are compiling our proposal response and need some guidance from various stakeholders for their input and they are critical of a complete submission.</p>	<p>4. Refer to responses – 2.1 & 2.2</p>
<p>5.1. What is their current Customer Insights solution (so we don't propose the same one)?</p> <p>5.2. Are SARS able to extend the current solution that expires on 11-Oct?</p> <p>5.3. Does SARS have an environment provisioned for the solution, or do we need to cost that as well?</p>	<p>5.1 Qualtrics XM, and the same solution may continue to be offered as the proposed solution.</p> <p>5.2 Refer to responses – 2.1 & 2.2</p> <p>5.3 SARS recognises that customer insight platforms are cloud-based solutions, consistent with the current system architecture. Additionally, SARS manages both quality assurance (QA) and pre-production environments to facilitate platform integration testing. These platforms are incorporated and assessed as part of the standard systems development lifecycle, which includes evaluation within the proposed environment for the platform. For ad hoc projects or campaigns, all testing is conducted within the designated customer insight platform environment; such ad hoc solutions progress through a single environment.</p>



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6.1 How many integrations	6.1 There are 37 integrations, which include digital pop-up, iframe, and API/workflow integrations. For details about the types of integrations, refer to section 4.8 of the BRS document.
6.2 How many responses will we be migrating from the other platform Sign-off date and is there a risk where SARS won't meet the deadline?	6.2 Over 3 million responses are scheduled for migration from the current platform to the new proposed platform. For information regarding the decision not to extend the deadline, please refer to the response provided in Question 2.
7.1 Based on clause 7.7 on page 16 of your Main Bid Document, will SARS allow bidders to provide a letter from the auditors confirming that the financials of the last year of the recent 3 years are still being audited and that they will be submitted as soon as the audits are finalised?	7.1 The service provide can provide a draft of the annual financial statements or signed latest management accounts.
Current Solution 8. Is SARS able to extend the current solution that expires on 11-Oct?	8.1 Refer to responses – 2.1 & 2.2
Integration 9. How many integrations are required, and to what systems?	9.1 Refer to 6.1's response. 9.2 Also refer to section 4.8 of the Business Requirement Specification (BRS) document which details the integration platforms.
Migration 10. How many responses will we be migrating from the other platform. Answer is +- 4M – Confirm, correct?	10.1 Refer to 6.2s response.
Legacy/Current Solution 11. What is their current Customer Insights solution?	11.1 Refer to 5.1's response.
Data Structure 12.1 What is the structure of the data to be migrated? 12.2 Does SARS have an environment provisioned for the solution, or do we need to cost that as well? 12.3 What is the Sign-off date and is there a risk where SARS won't meet the deadline?	12.1 Refer to section 4.9 of the BRS document. 12.2 Refer to 5.3's response. 12.3 SARS is scheduled to complete the process by the end of August 2025. Refer to 7.9 of Main RFP document for procurement timelines.



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13.1 Seeing that the Pricing Sheet does not allow for consumables, is it then a correct assumption that SARS will provide the communication channels, aka Email and SMS Gateways, and 13.2 SARS will provide the reports in real-time for delivery confirmations, bounce rates etc. as required?	13.1 and 13.2 These are functional requirements that must come with the proposed solution, as per sections 4.2, 9 and 14 of the BRS document.
Current Solution & Continuity 14. Which Customer Insights platform is currently in use?	14.1 Refer to responses in 5.1.
Timeline & Governance 15.1 What is the target contract signature date – Project Kick-off date, and what mitigation exists if internal approvals slip against the 11 Oct 2025 go live – 15.2 can the current solution use be extended will all a service gap be accepted?	15.1 As per the main RFP document, the SLA and contract conclusion will be managed with the recommended bidder. All agreed timelines for contacting will be specified following this process. The main RFT is expected to be completed within 22 days from the date of award. 15.2 Refer to responses in 2.1 and 2.2
Training & Adoption 16.1. How many end users (admins, analysts, campaign managers, viewers) must be trained in Year 1? 16.2 The pricing sheet shows a single training cost placeholder – does this apply per trainee or is SARS expecting a fixed total ?	16.1 Refer to responses in 1.1. 16.2 Refer to answers in 1.2
Survey Scope 17.1 At launch, how many survey/questionnaire/form types and what expected monthly volumes should the platform support? 17.2 Can you provide a breakdown and volume of surveys by type?	17.1 and 17.2 Refer to section 4 of the BRS document.
Integration 18.1 How many and which systems must integrate to the CIP (CRM, EDW, SSO, et al.) and what are their names/technologies? 18.2 Please indicate what type of interoperability is required with respect to “4.8 • Interoperability with external tools (e.g. Microsoft AI assistant, CRM, IVR/voice platforms).”	18.1 Refer to section 4.8 and section 11 of the BRS document. 18.2 Refer to section 4.8 and section 11 of the BRS document.



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Data Migration 19.1 Confirm the volume of historical responses to migrate (we understand ± 4 million) and provide a brief data structure description as well as the format in which they currently exist. 19.2 Can you provide list of and examples of dashboards to be migrated from the existing platform (4.9)?	19.1 Refer to responses in 6.2 and to section 4.9 of the BRS document. 19.2 Refer to Section 6 of the BRS document.
Analytics & BI 20. What is SARS' preferred BI tool (e.g., Power BI) and can existing enterprise licensing be leveraged for analysis dashboards?	20.1 The existing solution includes functionality for creating analysis dashboards. For further details, please consult Sections 6, 8, and 9 of the BRS document.
Solution Delivery 21. The solution will be delivered as a fully managed SaaS on a dedicated cloud instance for exclusive use by SARS. Is this an acceptable delivery model or does SARS have a different model in mind?	21.1 The solution will be delivered according the published RFP spec requirements being met.
Messaging Channels 22.1 Given the fixed-pricing requirement – how will transactional costs related to for instance messaging – SMS, WhatsApp, Email, USSD be managed - SARS supply message delivery connectors through existing Email & SMS gateways (and delivery metrics), or should the bid include managed messaging channel usage? 22.2 Can you provide approximate volumes of surveys expected in year 1 based on: 22.3 Inbound events where triggers on existing systems will invoke a survey to be displayed to the users; Triggered events where the CIP system is notified and a survey is sent to the user via an electronic channel like SMS, Email etc. Scheduled distributed surveys based on segments and business rules.	22.1 SARS digital interfaces (eFiling, MobiApp, WhatsApp, USSD and the SARS website). Refer to Section 4.8 of the BRS document. 22.2 Refer to Section 4.3 of the BRS document. 22.3 Refer to Sections 4,6 and 8 of the BRS document.
23. Will SARS accept bid returnable documents that are completed and signed electronically?	23.1 Yes. NB – note that bidders MUST submit all documents must be submitted in print format.



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24. Does SARS require a single memory stick (USB stick) that contains Folder 1 & Folder 2 or should bidders provide two separate USB sticks for each folder	24.1 Yes (there is no need for a separation. However, where there is separation, it will be accepted). NB – as per main RFP document, section 6.4 - bidders MUST submit all physical documents in print format at following location: SARS Procurement Tender Office Lehae La SARS 299 Bronkhorst Street, Nieuw Muckleneuk, Brooklyn Pretoria, 0181
List of Active Surveys 25. Please provide a full list of surveys currently in use across all channels and business units.	25.1 Refer to Sections 4,6 and 8 of the BRS document.
Survey Design Detail 26.1 For each survey, please indicate: <ul style="list-style-type: none">○ Approximate number of questions○ % of questions that are open-text (freeform responses) 26.2 Survey channel (email, SMS, WhatsApp, web, etc.)	26.1 The number of questions depends on business needs, typically ranging from 5 to 30. Surveys can use dynamic design with open-text triggers based on taxpayer responses. 26.2 Refer to Sections 4,6 and 8 of the BRS document.
27. Which Data Sets Should Be Migrated? <ul style="list-style-type: none">○ Are you planning to migrate all historical data (scores and free text)?○ Or just a limited timeframe / specific surveys?○ Or only aggregated dashboards and reporting views?	27.1 Yes, Refer to Sections 4,6 and 8 of the BRS document.
28. Free Text Migration <ul style="list-style-type: none">○ Do you wish to carry forward open-text responses for text analytics and sentiment modelling?○ Or only structured fields like scores and demographics?	28.1 Yes, as it contributes to sentiment analysis and is an ongoing component of VOC measurement.
29. Trigger Data Usage <ul style="list-style-type: none">○ Do you have defined data triggers for sending surveys? If yes, would you like to retain your existing survey trigger mechanisms (event-based, time-based, rule-based)? <ul style="list-style-type: none">○ Or redesign triggers as part of implementation?	29.1 Refer to Sections 4,6 and 8 of the BRS document. Yes, triggers are part of existing and ongoing processes.



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30. Dashboarding Requirements <ul style="list-style-type: none">○ Please describe your existing dashboards or reports (or attach screenshots/examples).○ How many dashboards do you currently use or expect to replicate?	30.1 Refer to Section 6 of the BRS document.
31. Custom Metrics or Calculated Fields <ul style="list-style-type: none">○ Do you have any derived metrics that need to be ported across?	31.1 Refer to Sections 4,6 and 8 of the BRS document.