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Tender Document

For the Upgrade of our ERP System to Cloud Based Microsoft Dynamics, Microsoft CRM and BI Tool.

1. Introduction

1.1 About the Business

OTL, established in 2002, is a Leeds-based Fast-Moving Consumer Goods (FMCG) distribution business. Our core operations include the procurement, warehousing, and distribution of a wide range of consumer products. We pride ourselves on delivering high-quality goods promptly and efficiently to retailers and consumers across the UK. With a robust supply chain network and a dedicated workforce, we continuously strive to enhance our operational efficiency and customer satisfaction.

1.2 Project Overview

As part of our strategic initiative to modernise our IT infrastructure, we are seeking proposals for upgrading our existing server-based ERP system to Microsoft Dynamics on the cloud and integrating it with Microsoft CRM, as well as implementing an appropriate BI tool. This upgrade aims to improve our operational efficiency, enhance data accessibility, and streamline customer relationship management processes.



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2. Project Overview

2.1 Objectives

- Upgrade the existing ERP system to Microsoft Dynamics on the cloud.
- Integrate Microsoft Dynamics with Microsoft CRM.
- Ensure seamless data migration and minimal disruption to ongoing operations.
- Enhance system security, reliability, and scalability.
- Improve user experience and operational efficiency.
- Implement a user-friendly BI tool.

2.2 Scope of Work

The scope of this project includes:

- Assessment of the current ERP system and infrastructure.
- Detailed planning and design of the new system architecture.
- Data migration from the existing ERP (MS Nav) to Microsoft Dynamics.
- Integration of Microsoft Dynamics with Microsoft CRM.
- Implementation of new BI tool.
- User training and change management support.
- Post-implementation support and maintenance.



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3. Methodology

3.1 Project Phases

Phase 1: Assessment and Planning

- Conduct a comprehensive analysis of the existing ERP system.
- Identify and document business requirements.
- Develop a detailed project plan, including timelines, milestones, and resource allocation.

Phase 2: Design and Configuration

- Design the new system architecture based on business requirements.
- Configure Microsoft Dynamics, Microsoft CRM and BI system to align with business processes.
- Develop data migration strategies and integration plans.

Phase 3: Data Migration and Integration

- Execute data migration from the current ERP to Microsoft Dynamics.
- Integrate Microsoft Dynamics with Microsoft CRM and BI system, ensuring data consistency and integrity.
- Conduct thorough testing to validate data migration and system integration.

Phase 4: Implementation and Training

- Deploy the new ERP, CRM and BI systems in a controlled environment.
- Train users on the new system functionalities and processes.
- Provide change management support to ensure smooth transition.



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Phase 5: Post-Implementation Support

- Monitor system performance and resolve any issues.
- Provide ongoing support and maintenance.
- Conduct a post-implementation review to assess project success and identify areas for improvement.

4. Deliverables and Outputs

4.1 Deliverables

- Detailed project plan and schedule.
- System architecture design documents.
- Configured Microsoft Dynamics, Microsoft CRM and BI systems.
- Data migration and integration reports.
- User training materials and change management support documentation.
- Post-implementation support plan.

4.2 Expected Outputs

- A fully functional Microsoft Dynamics ERP system on the cloud.
- Seamless integration with Microsoft CRM.
- Improved operational efficiency and data accessibility, primarily through a new BI system.
- Enhanced user experience and satisfaction.
- Increased system security, reliability, and scalability.



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5. Proposal Submission

5.1 Submission Requirements

Interested vendors should submit their proposals including:

- Company profile and relevant experience.
- Detailed methodology and approach.
- Project timeline and milestones.
- Resource allocation and team structure.
- Cost breakdown and payment terms.
- References from previous clients.

5.2 Submission Deadline

Proposals must be submitted by 23rd Aug 2024 to the following contact: IT@otltd.co.uk

6. Evaluation Criteria

Proposals will be evaluated based on:

- Understanding of the project requirements and objectives.
- Methodology and approach.
- Relevant experience and expertise.
- Cost-effectiveness.
- References and past performance.