

# CALL FOR PROPOSALS: DIGITAL TOOLS AND CRM IMPLEMENTATION SUPPORT

**Deadline for submissions:** 15 November 2025

**Type:** Consultancy / Freelance Engagement

## 1. Background

The **Sustainable Coconut Partnership (SCP)** is a global industry platform working to accelerate sustainability across the coconut sector. Our work connects leading companies, NGOs, and producer organizations to drive positive change for farmers, markets, and the planet. We are currently incubated and our incubator provides us the communication tools like Zoom, MS Teams, Member zone etc... we will leave incubation in January 2026 and need to set up our own systems.

We are a **small team** of 4 staff managing a network of members and partners across multiple countries. To improve efficiency and member engagement, SCP is seeking expert support to streamline its internal digital tools — including our **Member/Community Relationship Management (CRM) system, communications platforms (Zoom, Microsoft Teams, email tools), and workflow automations with our Wix Website.**

The overall goal is to receive **advise on best-fit tools for a small, globally distributed team, and implement them end-to-end:** CRM, communications, workflows, automations with our website, email list management. We want to simplify internal operations, reduce repetitive tasks, and strengthen member communication and engagement. We wish to find the systems that will be **safe, low maintenance system, operable by non IT professionals and that allows for scalable, affordable operations.**

## 2. Objective

We aim to identify a consultant or small firm who can:

1. **Advise** on the most appropriate, cost-effective digital tools to meet our operational and communication needs.
2. **Implement** an integrated system that connects our website, CRM, internal communication tools, and automation workflows.

## 3. Scope of Work

The selected consultant will:

1. **Review use cases, systems and workflows** — the use cases are in annex and our current structure includes a Wix website, mailchimp, gmail email addresses, we currently borrow our communications platforms (Zoom, Teams) from our incubator currently.
2. **Recommend a digital tool stack for safe, low maintenance, scalable, affordable operations**, suitable for a small, non-profit, globally distributed team (low maintenance, scalable, affordable).
3. **Implement or upgrade the CRM** — ensuring structured contact lists, segmentation, integration with website forms, event workflows, and member engagement tracking.
4. **Set up automation workflows**, e.g., automatic meeting notifications, contact form integrations, event registrations, and data synchronization.
5. **Train staff** — on daily use and maintenance of the tools implemented.
6. **Provide light documentation** — summarizing configuration, admin access, and maintenance guidance.

#### 4. Deliverables

- a. **ADVICE:** Digital tools assessment + recommended CRM workflows and communication system setup + Final technical handover note
- b. **OPTIONAL IMPLEMENTATION:** CRM configured with segmentation, contact syncing, automations with deplatforms integrated.
- c. **OPTIONAL IMPLEMENTATION:** Staff training (2–3 sessions, remote)

#### 5. Candidate Profile

We welcome proposals from **individual consultants or small teams** with experience in:

- CRM implementation and contact list segmentation (e.g., HubSpot, Zoho, Salesforce, Airtable-based CRM, etc.)
- Integration of communication tools (Zoom, Microsoft Teams, Google Workspace, etc.)
- Workflow automation (Make.com, Zapier, Power Automate)
- Work with non-profits, sustainability platforms, or associations (preferred)

#### 6. Budget and Timeline

- **Budget:** Competitive; please include your fee proposal in SGD or USD (itemized).
- **Timeline:** Implementation to start in **November 2025**, completed by **December 2025**.

#### 7. Proposal Submission

Interested consultants are invited to submit:

1. A brief **technical proposal** (max 3 pages) outlining:
  - Proposed approach and tools
  - Estimated time allocation and phases
  - Any recommendations or innovations
2. A **financial proposal** (separate or included)
3. **Portfolio or past references** demonstrating relevant work

Please send proposals to [info@coconutpartnership.org](mailto:info@coconutpartnership.org) with the subject line: *Proposal – Digital Tools & CRM Implementation – SCP*

#### 8. Evaluation Criteria

Proposals will be evaluated based on:

- Relevance of experience (40%) ; Quality and practicality of proposed approach (30%) ; Cost and value for money (20%) ; Availability and ability to deliver within timeline (10%)

#### 9. Contact

For clarifications before submission, please contact:

✉ [info@coconutpartnership.org](mailto:info@coconutpartnership.org)

🌐 [www.sustainablecoconutpartnership.org](http://www.sustainablecoconutpartnership.org)

## ANNEX - Use Cases

### 1. CRM (Contact & Member Relationship Management)

**Objective:** Centralize and segment member, partner, and contact information; support engagement workflows via a **safe, low maintenance system for non IT professional and that allows for scalable, affordable operations.**

**Use cases:**

- Migrating or setting up a CRM integrated with the Wix website and email marketing tools
- Automated updates to contact lists when forms are submitted on the website
- Segmenting contacts (members vs. prospects vs. partners)

**a. Advice:** Which CRM is simplest, stable, and cost-effective for a small distributed team.

**b. Optional Implementation:** CRM setup, data migration, segmentation, user permissions, integrations.

### 2. Communications Tools

**Objective:** Improve team collaboration, member engagement, and event management through an internal chat and project management tool, and recommendation of internal and member cloud storage (drive, member zone...)

**Use cases:**

- Integrating **Zoom or Microsoft Teams or other** for recurring webinars, virtual meetings, and workshops. (the team currently has google email addresses inherited from the wix website)
- Automatically sending meeting invites, reminders, and follow-ups to members.
- Centralizing notifications across email, CRM, and event workflows.
- Recommendation and setup of internal and member-accessible cloud storage, such as:
  - Shared Drive for internal team collaboration and document management.
  - A “Member Zone” or resource-sharing space for members (may be integrated with CRM and/or Wix website).

**a. Advice needed:** Best setup for communication and shared storage systems that are low maintenance, secure, scalable, and accessible globally. Integration options between team emails CRM, calendar, meetings, cloud drive systems, and website.

**b. Optional Implementation needed:** Configure communication accounts and workflows. Set up internal shared drives (e.g., Google Drive, OneDrive, Shared Folders). Set up a simple Member Zone (permissions, folder structure, access management, content upload workflows).

### 3. Automation Workflows

**Objective:** Reduce repetitive manual tasks and improve operational efficiency.

**Use cases:**

- Automating responses to **website form submissions** (e.g., member inquiries, event sign-ups).
- Syncing data between CRM, mailing tools, and project management software.

**a. Advice needed:** Identify which workflows are feasible and high-impact; recommend tools

**b. Implementation needed:** Build the workflows, test them, and train staff on maintenance.