



**RFI 50/10/24**

**REQUEST FOR INFORMATION (RFI)  
FOR CLIENT EXPERIENCE  
MANAGEMENT**

**RFI CLOSING DATE:  
13 November 2024 AT 11:00 AM**

## 1. ABOUT INDUSTRIAL DEVELOPMENT CORPORATION (IDC)

The Industrial Development Corporation (IDC) is South Africa's largest national development finance institution (DFI) whose primary objectives are to contribute to the generation of balanced, sustainable economic growth in Africa and to the economic empowerment of the South African population, thereby promoting the economic prosperity of all citizens. The IDC achieves this by promoting entrepreneurship through the building of competitive industries and enterprises based on sound business principles.

## 2. PROJECT BACKGROUND

The Industrial Development Corporation ("IDC") has historically conducted an annual client satisfaction survey. Scores and insights have remained fairly consistent while detailed insights from operational indicators and client's experiences have not translated into actionable outcomes directly linked to pain points experienced by clients. In this regard, the IDC wishes to understand the best practice approaches and technologies in client experience management available in the market in order to optimize insights from client touch points, address key pain points and drive operational and product excellence.

IDC serves clients through direct channels (i.e. Funding directly to the client) and indirectly (i.e. through implementation partners). Funding offered to clients is delivered through sector based strategic business units (offering debt and equity funding) and through a dedicated programmes unit (grants and debt funding). (An organogram and information on IDC sectors are attached). **For more information on the IDC business, please visit our website [www.idc.co.za](http://www.idc.co.za)**

Currently IDC conducts quarterly surveys in-house through short telephonic interviews to assess the client's experience of the pre-approval processes. An annual survey is conducted through an independent service provider in order to obtain a client satisfaction score for Key Performance Indicators (KPI) purposes and to gain independent insights into the client experience. The annual survey is typically conducted telephonically, and sample is supplemented through the use of online surveys sent to clients who are unable or unwilling to participate in a telephonic interview.

Below is an overview of historical data on sample size and response rate for the previous annual client experience surveys.

Financial Year	Sample Size <i>(supplied to service provider)</i>	Response Rate	Response Rate %
2023/2024	350	153 <i>(target was set at 300)</i>	51%
2022/2023	508	271 <i>(target was set at 300)</i>	53%
2021/2022	231	200	80%
2020/2021	227	122	54%

## **2.1 Objectives**

The main objectives of the RFI are to identify:

- best practice approaches to client experience management;
- Identify optimal approaches for different client segments;
- Identify optimal approaches to assessing client satisfaction / client experience while avoiding survey fatigue;
- Link client insights gained through complaints management and client engagement to key operational indicators;
- Identify optimal approach to client surveys; and
- Provide recommendations on embedment of Client Experience throughout the Corporation.

Bidders response to this RFI should incorporate all the objectives outlined above to enable the IDC to incorporate the voice of the client to drive continuous improvements.

## **3. SELECTION OF PREQUALIFIED RESPONDENTS**

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- 3.1.** This RFI is a stand-alone information-gathering and market-testing exercise, intended only to gain insights into the emerging trends and best practice in client experience management and to establish a shortlist of Prequalified Respondents for the subsequent RFP to implement the client experience management capability and / or client experience survey.
- 3.2.** No award can be made following a RFI process; however, the subsequent Request for Proposal (RFP) may be restricted to respondent service providers.
- 3.3.** IDC will shortlist a maximum of six (6) service providers, to whom the RFP to carry out the services shall be sent.

## **4. COMPLETENESS AND RESPONSIVENESS ASSESSMENT**

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- 4.1.** Request for information (RFI) to submit information for the goods/services as stated in the table. This RFI is a stand-alone information-gathering and market-testing exercise, intended only to inform and assist the IDC further deliberation and development of a strategy for the [Drafting note: insert name of project]. IDC may request indicative prices if so, stated in this RFI.
- 4.2.** Information submitted by Respondents will first be assessed for completeness and responsiveness. IDC shall reject any information that is not substantially responsive to the requirements of this RFI document.
- 4.3.** Only Respondents who present at least three (3) references for each of the technical criteria 4.3.1, 4.3.2 and 4.3.3 below will be considered for the RFP. Among these, IDC will only shortlist bidders who meet the minimum qualifying score of 70% on evaluations, to whom the RFP to carry out the services shall be sent.

TECHNICAL CRITERIA		
NUMBER	RESPONDENTS EXPERIENCE	WEIGHT
4.3.1	Respondents must have similar and relevant experience in client experience management within the Development Finance Institution (DFI) and / or other financial institutions in the banking environment.	30
4.3.2	Respondents must have experience in implementing client experience management programmes including surveys to approximately 400 respondents. Sample size.	40
4.3.3	Respondents' similar and relevant experience in engaging with customers on any channel: focus groups, in person interviews, responsive and branded email surveys, web interceptions, mobile in-app feedback, SMS and messaging channels, social feedback and reviews, Interactive Voice Response (IVR) systems, call and chat transcripts, and through connected, Internet of Things (IoT) devices.	30
Refer to <b>Table (b) Annexure 1</b> of this document for the response format provided		
<b>Overall Score</b>		<b>100</b>

**Note: The minimum qualifying score for evaluation is 70%. All bidders that fail to achieve the minimum qualifying score on evaluation shall not be considered for the RFP.**

## 5. ENQUIRIES

5.1. All communication and attempts to solicit information of any kind relative to this RFI should be channelled **in writing** to:

Name: Amelia Rawstone  
 Email address: [ameliar@idc.co.za](mailto:ameliar@idc.co.za)

5.2. Enquiries in relation to this RFI will not be entertained after 16h00 on 5 November 2024.

5.3. The enquiries will be consolidated, and IDC will issue one response, and such response will be posted, within two days after the last day of enquiries, onto the IDC website ([www.idc.co.za](http://www.idc.co.za)) under tenders i.e., next to the same RFI document.

5.4. The IDC may respond to any enquiry in its absolute discretion and the respondent acknowledges that it will have no claim against the IDC on the basis that its RFI was disadvantaged by lack of information, or inability to resolve ambiguities.

## 6. INSTRUCTIONS ON SUBMISSION OF RFI'S

6.1. RFI responses must be submitted in electronic format only and must be e-mailed to the dedicated e-mail address as provided herein.

6.2. RFI responses should be in generally acceptable / standard electronic file format/s (i.e., Microsoft suite of products or pdf) to enable access thereto by the IDC for purposes of evaluating responses received. Where documents are presented in a format which cannot be accessed by the IDC through generally acceptable formats, such RFI response will be disqualified.

6.3. The closing date for the submission of RFI's is 13 November 2024 not later than 11:00 AM (before midday). No late responses will be considered. RFI's must only be sent to [tenders@idc.co.za](mailto:tenders@idc.co.za). RFI's sent to any other email address other than the one specified herein will be disqualified and will not be considered for evaluation. It is the respondent's responsibility to ensure that the RFI is sent to the correct email address and that this is

received by the IDC before the closing date and time in IDC's dedicated tender e-mail inbox / address [tenders@idc.co.za](mailto:tenders@idc.co.za).

- 6.4. Respondents are advised to submit / send its RFI responses at least 30 minutes before the 11:00AM deadline to avoid any Information Technology (IT) network congestions or technical challenges in this regard which may result in RFI responses being received late. IDC's e-mail servers are configured to receive e-mails with sizes up to 50MB.
- 6.5. The IDC will not be held responsible for any of the following:
  - 6.5.1. RFI responses sent to the incorrect email address;
  - 6.5.2. RFI responses being inaccessible due to non-standard electronic file formats being utilised to submit responses by bidders;
  - 6.5.3. any security breaches and unlawful interception of RFI responses by third parties outside the IDC's IT network domain;
  - 6.5.4. RFI responses received late due to any IT network related congestions and/or technical challenges; and
  - 6.5.5. RFI responses with file size limits greater than IDC's e-mail receipt capacity of 50MB.
- 6.6. Only responses received via the specified email address will be considered.
- 6.7. Where a complete RFI response is **not received** by the IDC in its electronic email tender box ([tenders@idc.co.za](mailto:tenders@idc.co.za)) by the closing date and time, such a RFI response will be regarded as incomplete and late. Such late and / or incomplete RFI's will be disqualified. **It is the IDC's policy not to consider late RFI's for evaluation.**
- 6.8. Amended RFI's may be sent to the electronic tender box ([tenders@idc.co.za](mailto:tenders@idc.co.za)) **marked** "Amendment to RFI" and should be received by the IDC **before** the closing date and time of the RFI.

## 7. PREPARATION OF RFI RESPONSE

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- 7.1. All the documentation submitted in response to this RFI must be in English.
- 7.2. The respondents are responsible for all the costs that it shall incur related to the preparation and submission of the RFI document.
- 7.3. RFI's submitted by respondents which are companies or comprised of companies must be signed by a person or persons duly authorised thereto by a resolution of the applicable Board of Directors, a copy of which Resolution, duly certified, must be submitted with the bid.
- 7.4. The respondents should check the numbers of the pages of its bid to satisfy itself that none are missing or duplicated. No liability will be accepted by IDC in regard to anything arising from the fact that pages of a RFI are missing or duplicated.
- 7.5. Respondents tax affairs with SARS must be in order (tax compliant status) and respondents must provide written confirmation to this effect as part of their RFI response.

- 7.6. Respondents are free to form a Consortium, Joint Venture or Prime Contractor with Subcontractor(s) or associate themselves with other firms or independent experts to ensure that all required know-how, expertise and experience are available to them.
- 7.7. The cover page must clearly indicate the RFI reference number, RFI description and the company's name including any potential JV members and Sub-Consultants as well as contact details for an authorized representative of the Respondent.

**8. IDC'S RIGHTS**

- 8.1. IDC reserves the right to reject any responses submitted which are incomplete or which fail to meet the specified requirements as called for under this RFI.
- 8.2. The subsequent RFP process may include the acceptance and signing of a Non-Disclosure Agreement (NDA) by all invited Respondents to protect sensitive and confidential information which the IDC may share with such respondents.

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Name of your Company (in block letters)

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Signature(s) of the Tenderer or assignee(s)

Date

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Name of person signing (in block letters)

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Capacity

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Are you duly authorised to sign this Bid?

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Company Registration Number

---

VAT Registration Number

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Postal address (in block letters)

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Physical address (in block letters)

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Domicilium citandi et executandi in the RSA (full street address) (in block letters)

Contact person: \_\_\_\_\_ Telephone Number: \_\_\_\_\_.

Cell phone Number: \_\_\_\_\_ e-mail: \_\_\_\_\_

## ANNEXURE 1

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### Bidder's Experience

Request for Proposal No: \_\_\_\_\_

Name of Bidder: \_\_\_\_\_

Authorised signatory: \_\_\_\_\_

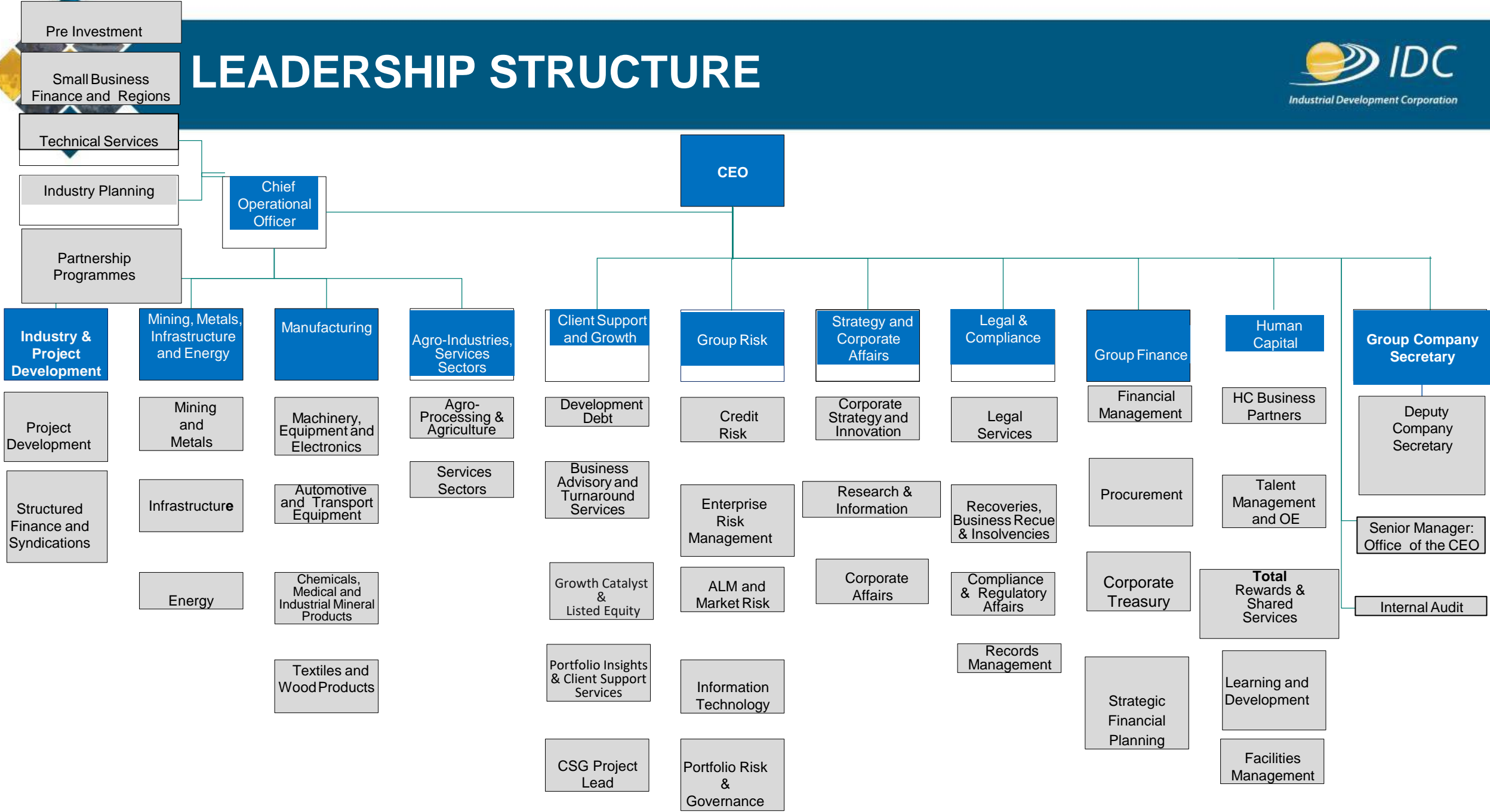
The bidder must provide the following information:

Table (a) Details of the bidder's experience as per technical criteria (please refer to paragraph 4.3.1, 4.3.2 and 4.3.3):

Client' Name	Industry	Project period	Description of service performed and extent of Bidder's responsibilities	Name, title, and telephone contact of client	Sample size	Methodology used in engaging with customers

The bidder must respond in the format above, where additional information is provided/ attached somewhere else; such information must be clearly referenced.

# LEADERSHIP STRUCTURE





*Partnering you.  
Growing the economy.  
Developing Africa.*



# Corporate *Profile*

*The primary driving force of commercially sustainable  
industrial development and innovation in  
South Africa and the rest of Africa.*

## **About us**

Since 1940, the Industrial Development Corporation (IDC), South Africa's largest development finance institution, has helped to build the industrial capacity that fuels the country's economic growth by funding viable businesses. South Africa's prosperity is inextricably linked to the economic development of the rest of Africa, which offers enormous market potential and as yet untapped resources. As the government's key partner in revitalising the economy, the IDC focuses on priority economic sectors that offer the greatest potential to unlock job opportunities.

## **Our vision**

To be the primary driving force of commercially sustainable industrial development and innovation to the benefit of South Africa and the rest of the African continent.

## **Our mission**

The Industrial Development Corporation is a national development institution whose primary objectives are to contribute to the generation of balanced, sustainable economic growth in Africa and to the economic empowerment of the South African population, thereby promoting the economic prosperity of all citizens. The IDC achieves this by promoting entrepreneurship through the building of competitive industries and enterprises based on sound business principles.

## **What we do**

Through partnership, the IDC provides funding in support of industrial capacity development.

## **We do this by:**

- Proactively identifying and funding high-impact projects
- Leading the creation of viable new industries
- Using our diverse industry expertise to drive growth in priority sectors
- Taking up higher-risk funding in early-stage and high-impact projects

## **The primary outcome of the IDC's activities:**

- To facilitate the creation of sustainable direct and indirect jobs

## **Additional outcomes include:**

- Regional equity
- Expansionary BEE
- Grow the SME sector with linkages to priority sectors
- Grow sectoral diversity and increase localisation
- Environmentally sustainable growth

## **Additional services**

IDC's business support programme offers non-financial support to entrepreneurs. The support is available during pre and post approval stages, including assistance to distressed clients.

## ***What we offer you:***

***The IDC offers funding across its mandated sectors under the following Strategic Business Units (SBU):***

***Basic Metals and Mining SBU*** offers finance for mining-related enterprises. This ranges from emerging mining houses to jewellery manufacturing, with a focus on operations that have a significant developmental component.

***Automotive, Transport and Equipment SBU*** provides industry and project development support to ferrous and non-ferrous metal-based manufacturing businesses. Sub-sectors supported by the unit include fabricated metal, capital and transport equipment; automotive assembly, including medium and heavy commercial vehicles, buses and taxis, and components; advanced manufacturing; and renewable and energy-saving industry components.

***Machinery, Equipment and Electronics SBU*** focuses on supporting industrial activities in the manufacturing of machinery and capital equipment, combined with innovations in electronics and robotics. The SBU aims to leverage the strength of pre-existing investments and relationships while allowing for alignment to the future of Machinery and Equipment for the 4IR industry.

***Chemicals, Medical and Industrial Mineral Products SBU*** supports entrepreneurship, promotes industrial development and strategic partnerships by building competitive industries and enterprises in South Africa and the rest of Africa.

***Textiles and Wood Products SBU*** supports a variety of enterprises across the industry, ranging from the production of natural or synthetic fabrics, to creating home décor, from leather goods to clothing manufacturing. The unit's more specific focus is on synthetic fibre production, spinning yarn, knitting, and weaving fabrics, dyeing, printing, and finishing fabrics, non-woven textiles, home textiles, clothing manufacturing, footwear, leather tanning and leather products.

***Agro-processing and Agriculture SBU*** invests in the development of projects and businesses that either create new or expand local manufacturing capacity – which often results in the creation of new jobs as well as replacing imports, facilitating increased exports, and enhancing competitiveness. This is done by, amongst other things, reducing production costs by introducing new technologies, increasing efficiencies, and promoting a value chain approach.

**Energy SBU's** role amongst others is to facilitate South Africa's energy transition and ensuring sustainable energy security in South Africa and the rest of the continent. South Africa's energy sector is currently undergoing several impactful transformations, moving from traditional fossil fuel power sources to lower carbon environmentally sustainable technologies and business models such as Renewable Energy (e.g. Solar PV, Wind, Biomass and Hydropower), Energy Storage Technologies, Green Hydrogen, Distributed Generation, Mini and Micro Grids, Energy Efficiency and Management among others.

**Infrastructure SBU** enables infrastructure enterprises to pursue growth opportunities in water and sanitation, telecommunications, logistics, and transport. The unit offers funding instruments that include debt, equity, and guarantees tailored to clients' businesses and project-specific needs. The structuring thereof and the funding terms are dependent on the business plans.

**Tourism and Services SBU** invests in the accommodation sub-sector, particularly driving investment into the underserved areas. It further supports niche tourism categories such as adventure and business tourism.

**Media and Audio Visual SBU** supports the production of local feature films, television shows, and documentaries. The unit further supports the development of digital cinemas in townships and rural areas that for long have lacked such facilities.

**Rest of Africa** is responsible for business development activities such as marketing IDC products, identifying suitable financing and investment opportunities throughout the rest of the African continent, and managing relationships with clients and stakeholders on the continent. The IDC brings a wealth of experience both locally and across borders to industrial transformation in Africa, supporting sustainable development on the continent.

## **What funding products do we have available?**

The IDC funds start-up and existing businesses with a minimum funding requirement of R1 million and a maximum of R1 billion.

**Funding can be structured utilising a wide array of instruments including:**

- Debt/equity
- Quasi-equity
- Guarantees
- Trade finance
- Bridging finance
- Venture capital

**The funding will be structured in the most appropriate manner to meet the business needs, and structuring options include:**

- Funding term: short-, medium- and long-term loans are available
- Payment holidays: this can be negotiated where applicable, allowing for periods where no payments need to be made on either capital or interest

### ***In addition, several special schemes are available including:***

- The Gro-e-Scheme that funds businesses with a high job creation potential at an interest rate of prime less 3%
- The UIF Fund that funds businesses with a high job creation potential at a fixed interest rate of 6%
- Transformation and Entrepreneurial Development (TES) that aims to assist entrepreneurs from marginalised groups to access the formal economy; Distressed Funding schemes that aim to save jobs by assisting companies across various sectors that have been affected by adverse conditions such as the recent economic downturn, the strong SA currency and natural disasters (e.g. floods, drought and fire)
- Sector-specific schemes (horticulture, forestry, clothing and textiles, hospitals)

### ***Minimum requirements***

- Security, the form and nature of which will relate to your specific circumstances
- Compliance with international environmental standards
- Shareholders/owners are expected to make some financial contribution:
  - The contribution of historically disadvantaged people under special circumstances may be lowered, in which case the IDC will be prepared to extend finance in excess of the owner's contribution
- The project/business must exhibit economic merit in terms of profitability and sustainability
- The IDC does not refinance fixed assets, since our aim is to expand the industrial base

## ***For IDC funding, the following will apply:***

- The purchaser must be a historically disadvantaged person or majority black-owned business
- At least 50% of the total IDC funding required is to be reinvested into the company for growth and expansion and additional jobs must be created. Pure acquisitions may be considered for qualifying businesses e.g. Black Industrialist
- The purchase price for the business or assets needs to be to the satisfaction of the IDC as determined by a fair valuation methodology
- The purchase price may be paid to the seller over a period of two to three years, subject to pre-determined targets of profitability being achieved

**DISCLAIMER:** Applicant(s) should use their own preferred sources of information to compile business plans, based on the nature of their businesses. The above-mentioned information constitutes a summary of our general guidelines, not an exhaustive list of requirements. Submission of an application in line with the guidelines does not guarantee that the IDC will approve a funding application. The Business Plan Guidelines document is neither an agreement nor an offer. It is to provide the Applicant(s) with information to assist the Applicant(s) to formulate its business plan. These guidelines do not claim to contain all the information each Applicant may require. Each Applicant should conduct its own investigations and analysis and should check the accuracy, reliability and completeness of the information in the Business Plan Guidelines document and where necessary obtain independent advice. The IDC makes no representation or warranty and shall incur no liability under any law, statute, rules or regulations as to the accuracy, reliability or completeness of this Business Plan Guidelines. The IDC may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this Business Plan Guidelines and without notice.

The Applicant(s) hereby consents to the IDC providing the information submitted pursuant to a funding application to a third party in adherence to the Promotion of Access to Information Act ("PAIA") and other legislation should it be required to so disclose.

The Business Plan Guidelines must be read in conjunction with the mandatory information and documentation to be made available to the Applicant(s) by the IDC following receipt of the Application.

***See the Business Plan Guidelines for a comprehensive list of requirements***

# Contact us

The Industrial Development Corporation has offices in all nine provinces of South Africa.  
For more information, please contact:

## Head Office:

### **Gauteng - Johannesburg (Sandton):**

19 Fredman Drive, Sandown, PO Box 7844055, Sandton, 2146  
Tel: 011 269 3000 | E-mail: [gp@idc.co.za](mailto:gp@idc.co.za) | [www.idc.co.za](http://www.idc.co.za)

### **Free State - Bloemfontein:**

No. 10 Barnes street, 2<sup>nd</sup> floor, Arboretum, Bloemfontein  
Private Bag X 11, Suite 25, Brandhof, 9324  
Tel: 051 411 1450 | Email: [fs@idc.co.za](mailto:fs@idc.co.za)

### **Limpopo - Polokwane:**

Ground Floor, Maneo Building, 73 Biccard Street, Polokwane  
Postnet Suite 422, Private Bag X9307, Polokwane, 0699  
Tel: 015 299 4080/4099 | Email: [lp@idc.co.za](mailto:lp@idc.co.za)

### **North West - Rustenburg:**

Suite 16, New Heights Office Park, 67 Brink Street, Rustenburg  
Postnet Suite 290, Private Bag X 82245, Rustenberg, 0030  
Tel: 014 591 9660/1 | Email: [nw@idc.co.za](mailto:nw@idc.co.za)

### **Brits:**

Suite 108, Safari Centre, 28 Van Velden Street, Brits, 0250  
Tel: 012 252 0008

### **Mahikeng:**

1B Mikro Plaza, cnr First Street / Bessemer Street, Industrial  
Sites Mafikeng  
Postnet Suite 89, Private Bag X2230, Mafikeng South, 2791  
Tel: 018 397 9942 | email: [mahikeng@idc.co.za](mailto:mahikeng@idc.co.za)

### **Northern Cape - Kimberley:**

Sanlam Business Complex, 13 Bishops Avenue,  
Kimberley, 8301  
PO Box 808, Kimberley, 8300  
Tel: 053 807 1050 | Email: [nc@idc.co.za](mailto:nc@idc.co.za)

### **Upington:**

De Drift Plaza, Block 6, Olyvenhoutsdrift Settlement,  
Louisvale Avenue, Upington, 8800  
Tel: 054 337 8600

### **Western Cape - Cape Town:**

2817, 24th Floor Foreshore Place, 2 Riebeeck Street,  
Cape Town  
PO Box 6905, Roggebaai, 8012  
Tel: 021 421 4794 | Email: [wc@idc.co.za](mailto:wc@idc.co.za)

### **Kwa Zulu Natal Durban:**

Suite 2101, 21st Floor, The Embassy Building, 199 Anton  
Lembede Str., Durban  
PO Box 2411, Durban, 4000  
Tel: 031 337 4455 | Email: [kzn@idc.co.za](mailto:kzn@idc.co.za)

### **Eastern Cape (East) - East London:**

2nd Floor Block B, Chesswood Office Park, Winkley Str,  
Berea, East London  
PO Box 19048, Tecoma, 5214  
Tel: 043 721 0733/4777 | Email: [ecEast@idc.co.za](mailto:ecEast@idc.co.za)

### **Mthatha:**

Seda offices, 7 Sprigg Street, Mthatha

### **Eastern Cape (West) - Port Elizabeth:**

Southern Life Gardens, Block A (Ground) 70 2nd Avenue,  
Newton Park, PE  
PO Box 27848, Greenacres, Port Elizabeth, 6057  
Tel 041 363 1640 | Email: [ecWest@idc.co.za](mailto:ecWest@idc.co.za)

### **Mpumalanga - Nelspruit:**

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7th Floor, Mbombela  
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Tel: 013 752 7724

### **eMalahleni (Witbank):**

Rm 304, Smokey Mountain Office Village, Route N4 Business  
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Tel: 013 658 2960/1