



Request for Tender: Salesforce CRM Development and Business Process Enhancement

Tender Release Date	28 August 2026
Deadline for Submission	17:30 (GMT+1), 18 September 2026

1. Background

HUGG is Ireland's national suicide bereavement organisation. Established in 2018, HUGG provides unique, suicide-specific support through peer-led support groups, a telephone line, an information hub, research, advocacy, and education. All our staff and volunteers have lived experience of suicide, bringing deep empathy and understanding to those who turn to us. We are the only national organisation dedicated to suicide bereavement support.

As HUGG continues to grow its services and reach, it is important that our systems, processes, and reporting capabilities evolve to support that growth. Salesforce is HUGG's primary Customer Relationship Management (CRM) platform and is used to manage information relating to service users, volunteers, supporters, fundraising activities, and organisational operations.

HUGG is seeking proposals from suitably qualified Salesforce developers, consultants, or organisations to undertake a programme of CRM development, process improvement, and automation. We have therefore identified a programme of CRM enhancement work and now seek a Salesforce development partner to review, refine, and implement these improvements

2. Project Pillars

While the project will involve a range of technical developments, process improvements and system enhancements, the work is expected to be delivered through four interconnected project pillars.

These pillars represent the key operational areas that HUGG intends to strengthen through the continued development of Salesforce. Tenderers should recognise that significant

overlap may exist between pillars, particularly around data architecture, permissions/roles, workflows, reporting, automation, and user experience.

Pillar 1: Volunteer Management for Telephone Support

HUGG is expanding its peer-to-peer Telephone Support service and requires Salesforce to better support the volunteer journey.

The successful provider will help design and develop a volunteer management system that supports:

- Volunteer recruitment and application management.
- Screening and onboarding processes.
- Training and compliance tracking.
- Roster and availability management.
- Volunteer communications and engagement.
- Recording volunteer activity and service contribution.
- Reporting on volunteer recruitment, retention, and participation.

The solution should support both operational efficiency and positive volunteer experience.

Pillar 2: Event and Campaign Management

HUGG delivers a range of events, awareness activities, training opportunities, and community engagement initiatives throughout the year.

Salesforce Campaigns functionality will be reviewed and enhanced to provide more effective management of:

- Event registrations and attendance.
- Participant journeys across multiple events.
- Audience segmentation.
- Communication and follow-up activities.
- Engagement tracking.
- Reporting on participation and impact.

The objective is to develop a more complete picture of how individuals engage with HUGG through events and related activities.

Pillar 3: Donor and Fundraising Management

As HUGG continues to diversify and grow its income streams, Salesforce should provide stronger support for fundraising and donor relationship management.

The successful provider will review current functionality and identify opportunities to improve:

- Donor management processes.
- Individual and organisational donor records.
- Donation tracking and reporting.
- Donor stewardship workflows.
- Fundraising campaign management.
- Relationship tracking and engagement history.
- Fundraising reporting and dashboard capabilities.

The aim is to ensure donor information is captured consistently and supports long-term relationship management.

Pillar 4: Telephone Support Service Administration and Service User Management

HUGG's Telephone Support service requires enhanced processes to support administration, service delivery, safeguarding, and reporting requirements.

The successful provider will work with HUGG to review and improve the management of:

- Service user records.
- Referral pathways and intake processes.
- Service user engagement and activity tracking.
- Group waiting lists and allocation processes.
- Support interactions and case management processes.
- Service-level dashboards and performance reporting.

The objective is to improve efficiency, consistency and quality of service administration while generating meaningful insights to support service planning and evaluation.

3. Objectives

We have identified the need for the following deliverables:

Review, development and optimisation of HUGG's Salesforce environment to:

- Strengthen data governance, stewardship, and quality management across the organisation.
- Reduce manual processes and administrative workload.
- Increase automation of key operational workflows.
- Strengthen reporting and dashboard capabilities.
- Establish a clear and scalable user access model through User Roles, Profiles, and Permission Sets.
- Support future growth through scalable architecture and integrations.
- Create clear documentation and training resources to support long-term adoption and sustainability.

To this end, we have defined the following business requirements:

Discovery and Technical Review

The successful provider will:

- Review HUGG's current Salesforce architecture and configuration.
- Identify gaps, duplication, and inefficiencies within the existing system.
- Assess opportunities to improve scalability and future-proof the platform.
- Recommend best practice solutions aligned with HUGG's operational needs.

Data Architecture and CRM Optimisation

The successful provider will:

- Review existing objects, fields, and relationships.
- Create new objects and fields where required.

- Reconfigure existing data structures where this would improve reporting, usability, or data quality.
- Improve alignment between Salesforce data capture and the service user journey.
- Implement measures to improve consistency and confidence in organisational data.

Workflow Automation and Integrations

The successful provider will:

- Identify opportunities to automate manual processes and reduce administrative burden across service delivery, volunteer management, fundraising, and organisational functions.
- Develop and enhance integrations between Salesforce and key organisational systems relating to:
 - Service enquiry forms
 - Telephone Support referrals
 - Volunteer applications
 - Event registrations
 - Fundraising and donation forms
 - Newsletter sign-ups
 - Contact and support request forms
 - Any other agreed website-based engagement processes
- Create automated workflows, notifications, task creation processes, pipelines, and approvals to support operational efficiency.
- Recommend and, where agreed, implement additional integrations that support operational effectiveness and support future service development.
- Review data flows between website forms, Salesforce, and any connected third-party systems to ensure information is captured accurately and efficiently.
- Assess and improve:
 - Data mapping and synchronisation
 - Duplicate prevention and record matching

- Consent capture and management
- Automated acknowledgements and follow-up communications
- Error handling and monitoring processes
- Ensure all integrations are appropriately documented and can be maintained internally following project completion.

Reporting and Dashboard Development

The successful provider will:

- Review existing reporting capabilities.
- Build reports and dashboards that support operational management and strategic decision-making.
- Improve reporting efficiency across service delivery, fundraising, and organisational functions.
- Enable more effective reporting to senior management, the Board of Directors, funders, and other stakeholders.
- Ensure key reporting outputs can be maintained internally following project completion.

Training and Documentation

The successful provider will:

- Produce user-friendly guidance documents and system manuals.
- Create clear "how-to" resources covering data entry, workflows, reporting, and system administration.
- Support knowledge transfer to internal staff.
- Reduce reliance on institutional knowledge and undocumented processes.

Testing, Deployment and Support

The successful provider will:

- Work closely with HUGG staff throughout development and testing.
- Support user acceptance testing.
- Deploy approved changes to the live environment.

- Provide post-implementation support for an agreed period.
- Supply all necessary documentation relating to system changes.

Data Governance and Stewardship

The successful provider will:

- Review HUGG's current data governance arrangements, data ownership structures, and CRM administration processes.
- Recommend and implement a practical data stewardship framework that can be maintained by HUGG following project completion.
- Define ownership and responsibility for key data domains, including service users, volunteers, donors, supporters, and organisational contacts.
- Develop data standards and guidance to promote consistency in data capture, management, and reporting across teams.
- Review duplicate management processes and implement appropriate controls to improve data quality and integrity.
- Implement validation rules, mandatory field requirements, and other quality assurance measures where appropriate.
- Review consent management, communication preferences, and data retention practices to ensure alignment with organisational requirements and applicable data protection legislation.
- Establish routine data quality monitoring processes and reporting mechanisms to support continuous improvement.
- Provide recommendations for ongoing CRM governance, including system administration, change control processes and future enhancement requests.
- Ensure governance processes, documentation and responsibilities can be maintained internally following project completion

4. Expertise Required

We would like to work with Salesforce consultant(s) or organisations with the skills and experience necessary to deliver the requirements outlined above and provide strategic and practical advice throughout the project.

The successful consultant or organisation will have:

- Strong experience in Salesforce administration, configuration, and development.
- Experience reviewing and improving CRM architecture and data models.
- Experience developing automated workflows and business processes.
- Experience designing reports and dashboards for charities, not-for-profits, or similar organisations.
- Experience integrating Salesforce with third-party platforms and applications.
- Strong project management and stakeholder engagement skills.
- Experience delivering user training and technical documentation.

Additional skills or attributes include:

- Experience working with charities, community organisations or not-for-profit organisations based in Ireland.
- Understanding of service delivery and client support environments.
- Familiarity with data protection and information governance requirements.
- Understanding of suicide bereavement support, mental health services, or related sectors.

5. Tender Response Requirements

Please submit:

- An overview of you or your organisation and relevant experience.
- Details of similar Salesforce projects delivered.
- Proposed approach and methodology.
- Information on the project team and key personnel.
- Estimated project timeline.
- Detailed pricing proposal, including daily rates and overall project cost.
- Details of any assumptions, exclusions, or dependencies.
- References from previous clients where available.

6. Indicative Timeline

Activity	Date
Call for Tender Issued	28 August 2026
Clarification Questions Deadline	11 September 2026
Tender Submission Deadline	18 September 2026
Evaluation and Shortlisting	21-25 September 2026
Interviews (if required)	29 September – 01 October 2026
Appointment of Successful Provider	02 October 2026
Project Commencement	05-09 October 2026
Discovery	12 – 23 October 2026
Improve ‘Data’ Architecture	26 October - 06 November 2026
Develop and Implement Workflows/Integrations	09 – 27 November 2026
Enhancement of Report	16 November – 04 December 2026
Create Training Resources	30 November – 11 December 2026
User Testing and Final Revision	07 – 11 December 2026
Project Completion and Handover	11 December 2026

7. Budget

Tenderers are invited to provide clear and transparent pricing that demonstrates value for money and aligns with the scope outlined in this document.

8. Submission Process

Tenderers should submit a proposal containing the following information:

- Contractor/Organisational profile.

- Outline of relevant experience.
- Understanding of requirements as set out in the tender document.
- Project plan and timeline.
- Pricing proposal.
- Risk management and quality assurance.
- Client references for comparable projects completed within the last five years.

Tender submissions should be sent by email to: recruit@hugg.ie by close of business, 17:30 (GMT+1), 18 September 2026.

Subject line: **Tender Submission – HUGG Salesforce CRM Development**

For clarification questions regarding this tender, please contact:
recruit@hugg.ie

Applications received after the submission deadline may not be considered.

9. Assessment Criteria

Proposals will be assessed against the following criteria:

- Understanding HUGG's requirements.
- Relevant Salesforce expertise and experience delivering similar projects.
- Quality of technical approach, including CRM architecture, automation, integrations, reporting, and governance
- Project team capability and capacity to deliver with the proposed timeframe.
- Experience working with charities or not-for-profit organisations.
- Value for money.
- References and track record of similar work.

HUGG is not bound to accept the lowest priced proposal or any proposal received. The organisation reserves the right to cancel, suspend or amend the procurement process at any stage and to negotiate aspects of the proposed scope, timeline or implementation approach with the preferred tenderer.

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