



Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

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Dear Solution Provider

The FPI is in the process of reviewing its line of business applications and has such put together a solution assessment document including business requirements. You will find this document accompanied with an overview of our organisation and summary of ideal system we looking for.

Have a look at these documents and if you find that your product and solutions could meet FPI's requirement, we would like you to complete the documents and submit it back for the initial assessment and scoring by the FPI.

The analysis is done in three phases indicated below.

Phase 1 – Request for solution.

At the end of this phase the FPI will notify the shortlisted suppliers and they will move onto the next phased based on the outcome of the review.

Phase 2 - Further clarification with the shortlisted suppliers to fine tune the solution and clarify any requirements in detail.

At the end of this phase three suppliers will be selected to move onto the final phase.

Phase 3 – Meet with each supplier for a demonstration of the proposed solution and discuss implementation timelines and costing.

At the end of this phase one supplier will be selected to provide an official project plan with costing and timelines to continue the relationship with the FPI going forward.

Suppliers that do not meet the requirements in each phase will be notified.

Please note that the due date for the submission of above requested first phase assessment is due by no later than close of business 11 September 2020

Submissions can be e-mailed to ITAdmin@fpi.co.za.

Kind Regards

Dennis Swanepoel
Manager - ITG Services