



TERMS OF REFERENCE

Strategic Planning & Execution Software

Pioneer Insurance Group

1. BACKGROUND

Pioneer Insurance Group seeks to procure a comprehensive Strategic Planning & Execution Software solution to enhance organizational strategy management, performance tracking, and execution capabilities across all business units. This system will serve as the central platform for monitoring corporate and individual performance against defined strategic objectives.

2. OBJECTIVE

To acquire and implement a robust software solution that enables effective strategic planning, real-time performance monitoring, project tracking, and comprehensive reporting capabilities aligned with Pioneer Insurance Group's transformation agenda.

3. SCOPE OF WORK

3.1 Core Functional Requirements

Strategy Performance Management

- Track and monitor strategy execution against defined Key Performance Indicators (KPIs)
- Support KPI management at both corporate and individual employee levels
- Enable creation and tracking of composite KPIs with flexible weighting mechanisms
- Provide real-time dashboards and visualization of performance metrics
- Support cascading of strategic objectives across organizational hierarchy
- Generate automated performance scorecards and balanced scorecards

Project & Initiative Tracking

- Comprehensive project portfolio management capabilities



- Track strategic initiatives from inception to completion
- Monitor project milestones, deliverables, and dependencies
- Resource allocation and capacity planning features
- Automated status reporting with customizable templates
- Risk and issue management functionality
- Integration with project timelines and Gantt charts

Reporting & Analytics

- Executive dashboards with drill-down capabilities
- Customizable reports for different stakeholder groups
- Trend analysis and predictive analytics
- Export functionality (PDF, Excel, PowerPoint)
- Automated report scheduling and distribution
- Mobile-responsive reporting interface

3.2 Technical Requirements

System Customization

- Configurable KPI frameworks and measurement methodologies
- Customizable workflow approvals and escalation rules
- Flexible user interface and dashboard customization
- Ability to create custom fields and data structures
- Configurable notification and alert mechanisms
- Support for organizational structure changes without system disruption
- API availability for integration with existing systems

Security & Access Control

- Role-based access control (RBAC) with granular permissions
- Multi-factor authentication (MFA) capability



- Data encryption at rest and in transit (minimum AES-256)
- Audit trail and activity logging
- Compliance with ISO 27001 or equivalent security standards
- Regular security vulnerability assessments and penetration testing
- Data backup and disaster recovery protocols
- Single Sign-On (SSO) integration capability

Integration Requirements (Good to have)

- Integration with existing HR systems for employee data synchronization
- API connectivity for financial systems integration
- Support for data import/export in standard formats (CSV, Excel, XML, JSON)
- Email system integration for notifications

3.3 Support & Maintenance

Support Services

- Dedicated support team with clear escalation matrix
- Multi-channel support (email, phone, portal)
- Support availability: Business hours (8 AM - 5 PM EAT) minimum
- Turnaround Time (TAT) for issue resolution:
 - **Critical Issues** (system down): 4 hours
 - **High Priority** (major functionality impaired): 24 hours
 - **Medium Priority** (minor functionality issues): 72 hours
 - **Low Priority** (general queries, enhancements): 5 business days
- Monthly system health checks and performance reviews
- Quarterly business review meetings

Training & Change Management

- Comprehensive training for system administrators (minimum 3 days)



- End-user training sessions (virtual and in-person options)
- Training materials and user documentation
- Train-the-trainer program for internal capacity building
- Change management support during rollout

Maintenance & Updates

- Regular system updates and patches
- Version upgrade management with minimal downtime
- Performance optimization and tuning
- Database maintenance and optimization

4. IMPLEMENTATION TIMELINE

Milestone	Target Date
Proposal Submission Deadline	20th January 2026
Vendor Evaluation & Selection	21st January 2026
Contract Award	22nd January 2026
System Configuration & Setup	23rd - 30th January 2026
User Training	02nd - 6th February 2026
Go-Live/Rollout	16th February 2026

5. PROPOSAL REQUIREMENTS

Interested vendors must submit comprehensive proposals including:

5.1 Technical Proposal

- Detailed system architecture and technology stack
- Feature-by-feature response to functional requirements



- Customization capabilities and limitations
- Security certifications and compliance documentation
- Integration approach and capabilities
- Implementation methodology and project plan
- System scalability and performance specifications

5.2 Commercial Proposal

- **Detailed cost breakdown including:**
 - Software licensing costs (perpetual vs. subscription model)
 - Implementation and configuration fees
 - Training costs (per user/per session)
 - Annual maintenance and support fees
 - Customization costs (if applicable)
 - Infrastructure requirements and costs (if on-premise)
 - Any additional or hidden costs
- Payment terms and schedule
- Total Cost of Ownership (TCO) for 3 years

5.3 Company Profile & References

- Company registration and tax compliance certificates
- Organizational profile and relevant experience
- **Minimum 3 client references** for similar implementations, including:
 - Client name and contact person
 - Project scope and duration
 - Contact details (email and phone)
- Case studies demonstrating successful implementations
- Vendor financial stability documentation



5.4 Support Documentation

- Service Level Agreement (SLA) draft
- Support structure and escalation matrix
- Disaster recovery and business continuity plans
- Data privacy and security policies

6. EVALUATION CRITERIA

Proposals will be evaluated based on:

Criteria	Weight
Functional fit and feature completeness	30%
Technical capability and security	20%
Cost and value for money	20%
Implementation timeline and approach	15%
Vendor experience and references	10%
Support and maintenance terms	5%

7. SUBMISSION DETAILS

Submission Deadline: 15th January 2026, 5:00 PM EAT

Submit proposals to:

Chief Strategy & Transformation Officer

Pioneer Insurance Group

Email: rolonde@pioneerassurance.co.ke

Submission Format:

- Electronic submission in PDF format
- Subject line: "Proposal - Strategic Planning & Execution Software"



- File naming convention: "VendorName_StrategicPlanning_Proposal_2026"

9. CONTACT INFORMATION

For clarifications or queries regarding this Terms of Reference:

Chief Strategy & Transformation Officer

Pioneer Insurance Group

Email: rolonde@pioneerassurance.co.ke

Issued Date: 7th January 2026