

## **REQUEST FOR PROPOSAL**

For

## **CONTACT CENTRE SOLUTION**

**Issue Date:** 6<sup>th</sup> June 2011

**Last Date for submission of proposals:** 30<sup>th</sup> June 2011

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## **1.0 INTRODUCTION and SCOPE**

Canara HSBC Oriental Bank of Commerce Life Insurance Company Limited (“Company”) is carrying on life insurance business in India. As part of supporting its operations and processes, the Company is looking for Contact Centre Solution for its location Gurgaon, Hyderabad & Outsource location starting 6<sup>th</sup> June 2011 for which this RFP is being issued.

### **1.1 Purpose**

The purpose of this RFP is to inform potential Bidders of a business opportunity and to solicit proposals for Contact Centre Solution as currently contemplated by the Company. Based upon the review and evaluation of proposals offered in response to this RFP, Company may at its sole discretion negotiate and enter into contracts with one or more successful Bidders.

Notwithstanding any other provision herein, Bidder participation in this process is voluntary and at Bidder's sole discretion. Price will be a consideration but will not be the sole factor in Company's decision to award a contractual relationship. Company reserves the right to accept or reject any or all bids from a specific or multiple Bidders for any reason at any time. Company also reserves the right at its sole discretion to select or reject any or all Bidder(s) in this process and will not be responsible for any direct or indirect costs incurred by the Bidders in this process.

### **1.2 Request for Proposal Definitions**

Throughout this Request for Proposal, the following definitions are used:

- “Bidder” means an company incorporated under the Companies Act 1956, that submits, or intends to submit, a proposal in response to this “Request for Proposal”;
- “Vendor” means the Bidder(s) awarded a Contract resulting from this RFP;
- “Contract” means the agreement formed between the Company and the successful bidder as evidenced by an Agreement issued by the Company;
- “Contract Documents” means the Agreement, the Bidders proposal document, the RFP and such other documents as listed in the Agreement, including all amendments or addenda agreed between the parties;
- “Must”, “mandatory” or “required” means an absolute minimum function or capacity, which, if not satisfied in the proposal, may result in disqualification in the final evaluation;
- “De-identification” is the process of removing from data any information from electronic media that identifies a particular individual.
- “RFP” means this request for proposal including any amendments, attachments, and/or clarifications pertaining to this RFP that may be issued prior to the closing date; and,
- “Should”, “may” or “is desirable” means desirable but not mandatory functions or capacities. Bidders who are able to provide these functions or capacities may be

evaluated more favorably than those who cannot.

## **2.0 Terms of the RFP**

### **2.1 Acknowledgement**

Company is going to release the RFP for Contact Centre Solution online on its website ([www.canarahsbclife.com](http://www.canarahsbclife.com)) with the sole aim of making the process free, fair & transparent and user friendly. The Bid (as per attached formats) duly sealed and super scribed "Proposal for Contact Centre Solution" **should be addressed to "AVP-IT (Network & Telecom)", Canara HSBC Oriental Bank of Commerce Life Insurance Company Limited, 2<sup>nd</sup> Floor, Unitech Trade Centre, Sector-43, Sushant Lok-1, Gurgaon-122001.** Please note that the Technical and Commercial bid has to be in separate sealed envelopes duly marked as Technical Bid and Commercial Bids respectively. Company is not responsible for non-receipt of quotations by the specified date and time due to any reason including holidays. All questions / clarifications should be communicated only on email id [RFP.IT@Canarahsbclife.in](mailto:RFP.IT@Canarahsbclife.in) Last date for receipt of any query is 12<sup>th</sup> June 2011 Quotations received after the stipulated time or the Due date or incomplete in any respect are liable to be rejected.

### **2.2 Proposal Deadlines**

Company must receive duly completed and signed proposals not later than 30<sup>th</sup> June 2011.

### **2.3 Company's Obligations**

The submission and receipt of proposals does not obligate Company in any way. Company shall not be liable for any costs incurred by Bidders in the preparation, presentation or any other aspect of the proposals received by reason of this request, nor is Company obligated to negotiate separately with any sources whatsoever in any manner necessary to serve Bidder's best interests. Company makes no representation, implied or express, that it will accept and approve any proposal submitted. Any and all Contracts which result from this RFP shall be non-exclusive, non-commitment, as-ordered agreements. Company shall not have any liability to bidders for any interruption or delay in access to the site irrespective of the cause. Company will also be not responsible for any damages, including damages that result from, but are not limited to negligence. Also Company will not be held responsible for consequential damages, including but not limited to systems problems, inability to use the system, loss of electronic information etc.

### **2.4 Proposal Evaluation**

Proposals submitted may be reviewed and evaluated by any person at the discretion of Company's internal evaluation team, including non-allied and independent consultants retained by Company now or in the future for the sole purpose of obtaining evaluations to proposals.

Bidders may be asked to further explain or clarify areas of their proposal in writing during the evaluation process.

Bidders are expected to submit their best bid in response to the RFP. The bids quoted shall be according to the scope of work (Refer Annexure I) in this document. The bidder is also required to fill the Vendor Compliance data for technical requirement as mentioned in the scope of work.

The only information regarding status of the evaluation of proposals that the team will give to any inquiring Bidder shall be whether or not that Bidder has been awarded a Contract. Company may, at its sole discretion, inform any inquiring Bidder of the reason(s) why it was

not awarded the bid.

Company reserves the right to conduct a reverse e-auction after the completion of the RFP process, the schedule of which will be intimated later to all the pre-qualified bidders.

## **2.5 RFP Terms and Conditions Applied to Final Contract**

The terms and conditions of the RFP, including the specifications and the completed proposal, will become, at Company's sole discretion, part of the final Contract (the "Contract") between Company and the selected Bidder. In the event that responses to the terms and conditions will materially impair a Bidder's ability to respond to the RFP, Bidder should notify Company in writing of the impairment. If Bidder fails to object to any condition incorporated herein, it shall mean that Bidder agrees with, and will comply with the conditions set forth herein.

Any exceptions to the terms and conditions or any additions, which Bidder may wish to include in the RFP, should be made in writing and included in the form of an attachment to the applicable Section in the RFP.

## **2.6 Terms Binding on Bidder**

Following the date for submission of proposals, and prior to Contract award, the RFP shall be binding upon Bidder in all respects for a period of 180 days.

## **2.7 Hold Harmless**

In submitting a proposal, Bidder understands that Company will determine at its sole discretion which proposal, if any, is accepted. Bidder waives any right to claim damages of any nature whatsoever based on the selection process, final selection, and any communications associated with the selection.

Company reserves the right to award the Contract to the Bidder(s) whose proposal is deemed to be the most advantageous in meeting the specifications of the RFP. In addition, Company reserves the right to add or waive any requirements contained in this RFP at its sole discretion with regard to proposals submitted. Company's decision on award of Contract shall be final and binding on all the Bidders.

Company shall be at liberty to cancel the online RFP / online reverse auction process at any time, before ordering, without assigning any reason.

## **2.8 Confidentiality Provision**

The terms of this RFP, the information provided by Company herein and all other information provided by Bidder in connection with the services offered to be provided by the Bidder pursuant to this RFP, are to be treated by Bidder as strictly confidential and proprietary. Such materials are to be used solely for the purpose of responding to this request. Access shall not be granted to third parties except upon prior consent of Company and upon the written agreement of the intended recipient to treat the same as confidential. Company may request at any time that any of Company's material be returned or destroyed.

Should Bidder choose not to respond to this RFP, please return all materials and any duplicates thereof at:

**Title: RFP for "Contact Centre Solution."  
Kind Attn: AVP-IT (Network & Telecom)  
Canara HSBC Oriental Bank of Commerce Life Insurance Company Ltd.  
2<sup>nd</sup> Floor, Unitech Trade Centre  
Sector-43, Sushant Lok-1  
Gurgaon-122001,  
Haryana.**

## **2.9 Sub-Contracting**

The services offered to be undertaken in response to this RFP shall be undertaken to be provided by the Bidder directly employing their employees, and there shall not be any sub-contracting, franchisee, contract to hire, and consultant etc. arrangement done by the Bidder. The deputed person should be only on bidder rolls.

## **2.10 Acceptance of Proposals**

Company reserves the right to modify the terms of the RFP at any time at its sole discretion and the same will be uploaded on the website <http://www.canarahsbclife.com>. The bidders have to remain updated about the same from the website and Company will not be responsible for such information not being downloaded by the bidder. Subsequent to the submission of proposals, interviews and negotiations may be conducted with one or more Bidders, but there will be no obligation to receive further information, whether written or oral, from any Bidder not to disclose the nature of any proposal received.

This RFP should not be construed as an agreement to purchase products or services. Company is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed in accordance with the evaluation criteria.

## **2.11 Evaluation and Selection**

A committee will evaluate proposals against the mandatory criteria as detailed herein. Proposals meeting all the mandatory criteria will then be assessed and scored against the evaluation criteria. Company's decision on evaluation shall be final and binding on all the bidders. Bidders who qualify the evaluation criteria will be empanelled for services. Commercial bids will be opened for the empanelled bidders post technical evaluation. Any deviations from the skill set / experience / prerequisites/ requirements and/or the terms and conditions of the Tender Document shall be submitted explicitly along with convincing reasons in the format attached (refer Clause 5.1). Company will not provide any justification in case rejects deviation and Company reserves all rights to reject or accept any deviation.

## **2.12 Liability for Errors**

While Company has used considerable efforts to ensure an accurate representation of outsourced, the information contained in this RFP is supplied as a guideline for Bidders. The information is not guaranteed or warranted accurate by Company, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve information in this RFP as per its current understanding of the requirements under various activities to be Bidders from forming their own opinions and conclusions with respect to the matters addressed in this RFP. In the event Company finds that the objectives of the intended outsourcing is better achieved by processes/procedures other than those mentioned in this document, Company shall have the right irrespective of the fact whether it has already received proposals from intending bidders or not, to effect such changes and enter into negotiations with one or more Bidders at its sole discretion for such changed/modified processes.

## **2.13 Acceptance of Terms**

All the terms and conditions of this RFP shall be deemed to be accepted by the Bidder and incorporated in its proposal unless specifically notified otherwise.

## 2.14 Ownership of Proposals

All documentation, including proposals, submitted to Company will become the property of Company.

## 2.15 Use of Request for Proposal

This document or any portion thereof, is the property of Company and may not be used or copied for any purpose other than the submission of the Bidder's proposal.

## 2.16 RFP Schedule

- Company advertises RFP on its website 06<sup>th</sup> June 2011
- All inquiries regarding RFP due by close of business 12<sup>th</sup> June 2011
- Answer to queries 15<sup>th</sup> June 2011
- Bidders' deadline for submitting responses to RFP 30<sup>th</sup> June 2011
- Technical evaluation and Shortlisted bidder's solution presentation 7<sup>th</sup> July–20<sup>th</sup> July 2011

## 2.17 Delay in performance of the obligations by the Bidder

The company is looking for Delivery and Implementation within 8 weeks of issuing the formal order. Any exception to this timeline will prompt the company to impose the penalty on the bidder as mentioned below:

- A. Penalty:** Company shall impose a penalty of 0.25% of the PO value for each day of delay.
- B. Termination:** The Company reserves the right to terminate the purchase agreement anytime after a delay of 25 days.

## 3.0 Proposal Preparation

This section defines the proposal preparation and submission procedures, which are to be followed by all Bidders. Bidders are cautioned to carefully read and follow the procedures required by this RFP. Please note that deviations may be cause for rejection of your proposal.

### 3.1 Proposal Format

The Bid (attached formats) duly sealed and super scribed “.Contact Centre Solution” for **Company should be** addressed to **AVP-IT (Network & Telecom)**, Canara HSBC Oriental Bank of Commerce Life Insurance Company Limited, 2<sup>nd</sup> Floor, Unitech Trade Centre, Sector-43, Sushant Lok-1, Gurgaon -122001. Please note that the Technical and Commercial bid has to be in separate sealed envelopes duly marked as **Technical Bid** and **Commercial Bids** respectively. Company is not responsible for non-receipt of quotations by the specified date and time due to any reason including holidays. All questions / clarifications should be communicated **only** on email id [RFP.IT@Canarahsbclife.in](mailto:RFP.IT@Canarahsbclife.in) **Last date for receipt of any query is 12<sup>th</sup> June 11.** Quotations received after the stipulated time of the Due date or incomplete in any respect are liable to be rejected.

- a) Bidder's name and address, Bidder's telephone number, email address and a contact person.

- b) One page letter of introduction identifying the Bidder and signed by the person or persons authorised to sign and bind the Bidder to statements made in the proposal. The returned RFP will be referenced as an attachment if/when a contractual agreement is executed. This document has to be uploaded and mapped with this corresponding schedule.
- c) Please follow the format of this RFP, placing answers in the text box immediately after sections requiring responses. Please do not enter any information into any part of this document other than the boxes provided. The boxes will expand to accommodate responses of any length.
- d) NO CHANGES TO THE LINES, FORMAT OR STRUCTURE OF ANY SPREADSHEETS IS PERMITTED. CHANGING THE SPREADSHEETS IN ANY WAY, OTHER THAN INSERTING THE REQUIRED INFORMATION, SHALL BE CONSIDERED CAUSE FOR YOUR COMPANY'S DISQUALIFICATION FROM FURTHER ANALYSIS AND PARTICIPATION IN THE RFP PROCESS.
- e) Any additional information, brochures, etc., can be provided at the discretion of the Bidder and should be clearly labelled and uploaded.

### **3.2 Notification of Changes**

All recipients of this RFP will be notified of any changes if any made to this document prior to the due date of submission of proposals.

### **3.3 Changes to Proposed Wording**

The Bidder will not be permitted to change the wording of its proposal after submission to Company. No words or comments will be added to the general conditions or detailed specifications unless requested by Company for the purposes of clarification.

### **3.4 Bidder's Expenses**

Bidders are solely responsible for their own expenses in preparing and submitting a proposal to Company, if any.

### **3.5 Currency, Taxes & Payment Terms**

Prices quoted are to be:

- In Indian rupees;
- Exclusive of all taxes.

Payment Terms:

- 50% of PO value after 100% delivery of components.
- 40% of PO value after successful implementation as per Scope of Work.
- Balance 10% of PO value post final sign-off of Business User Acceptance.

### **3.6 Completeness of Proposal**

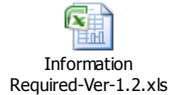
By submission of a proposal, the Bidder warrants that all components required to manage the program have been identified in the proposal or will be provided by the Company at no charge.

## 4.0 Scope

The detailed scope of work has been attached as Annexure I

### 4.1 Criteria

The purpose of this section is for Bidders to provide information to demonstrate to Company that its services offering satisfy Company's requirements. The bidder should also demonstrate that it has the financial and organizational infrastructure to fulfil the fundamental requirements set out in this RFP. Bidders not meeting them or not demonstrating that they do meet them may not receive further consideration during the evaluation process. A complete listing of the Vendor and Technical Evaluation criteria is included in attached file below :



### 4.2 Pricing Model

The prices have to be submitted in sealed envelopes as per the format given in Annexure II

## 5.0 Agreements

The selected bidder will be required to execute the services agreement and Non-Disclosure agreement as attached below:



### 5.1 Deviation Sheet

#### **Deviations from Technical Specifications and Terms and Conditions of the Tender**

	RFP Document Clause	Technical Specification or Terms and Condition in the RFP document	Deviation offered	Reasons and whether deviation adds to the operational efficiency in case of the systems
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

**Note:**

Deviations from any of the terms and conditions of the tender document should be specified

If any deviations from the technical specifications are warranted, reasons for such variations should be specified and if such deviations/ variations add to improvement of the overall performance of the systems, those should be specifically mentioned and supported by relevant technical documentation as specified above.

## ANNEXURE 1- SCOPE OF WORK

### SCOPE:

Establish a Collaborative approach to Enhance and Uniform Customer Experience across all Interaction Channels – Inbound, Outbound, IVR, Fax, Chat and Emails with inbuilt Quality Management and Adopt long term solution which can meet today's and future need of Company.

**Solution Capacities, Scalability and Capabilities:** Company is required to deploy Unified Contact Center Solution at Gurgaon and Hyderabad Location; initially Gurgaon location will be operated in Active mode and Hyderabad location will be treated as Passive (DR) Location. If Gurgaon site fall in disaster, Hyderabad location should operate in Active mode. Agents will use IP Soft phone to login in the Gurgaon system and in case of disaster all agents will login to Hyderabad system.

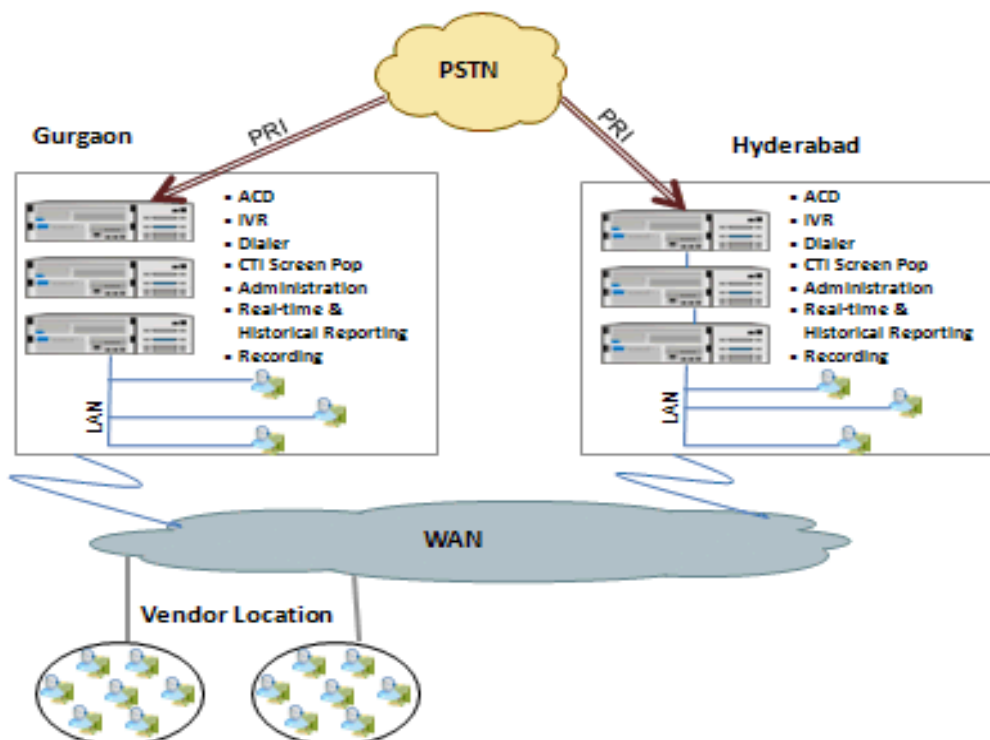
The proposed solution should be ready to operate in Active (Gurgaon) - Active (Hyderabad) mode for future requirement.

Gurgaon Solution is required to be extended to outsource location over WAN with IP Soft Phones and local PRI lines. This will be 3<sup>rd</sup> location which will have inbound & outbound calling facility. Agents will sit in outsourced location and require registering in Gurgaon system. If Gurgaon system/site goes down 3<sup>rd</sup> location Agents will be registering at Hyderabad system over the WAN.

Below are the location details:

- a) **Gurgaon Location:** Unitech Trade Center, 2nd Floor , C- Block, Sushant Lok , Ph - I, Sector - 43 , Gurgaon - 122002
- b) **Hyderabad Location:** Vatika Business Centre, 3rd floor, NSL-Icon, Plot no 1-4, Road no. 12, BanjaraHills, Hyderabad-500034
- c) **Outsource Location:** Option 1 – Gurgaon | Option 2 – Outside of Gurgaon

### Required architecture:



## 1. Requirement Overview:

- Inbound Calling with IVR Call Tree (will be provided on request) and skill based routing.
- Outbound – Predictive, Preview and manual Dialling
- IVR Campaign Call Blaster (Script and voice prompt will be provided by Canara HSBC)
- Voice recording - 100%
- Screen recording - 5% (Only Gurgaon)
- Reporting

1.1. Sizing guidelines- Vendors are requested to refer following details to workout Trunk-lines and system resources:

S. No.	Seat Type	Gurgaon	Hyderabad	Outsource Location
1	Inbound Agents	19	-	-
2	Outbound Agents	61	-	60
3	Blend Agents	5	-	5
5	Supervisor	8	2	-
6	DR Inbound Agents	-	10	-
7	DR Outbound Agents	-	20	25
8	IVR Ports	100	50	-
9	PRIs	2 - Inbound Toll Free 4 - Outbound	2 - Inbound Toll Free (DR) 1 - Outbound	2 - Outbound

1.2. Solution should support SIP protocol.

1.3. Solution should be installed on Latest Windows Server OS.

1.4. Solution should be ready to scale immediately up to 250 Agents at Gurgaon & 100 Agents at Hyderabad without up gradation of Servers Hardware, Software, Application, etc. Only licenses to be added.

1.5. Overall Solution should be scalable up to 1500 - 2000 Agents on the same platform (core application) with recommended additional server & telephony hardware, adequate PRIs, licenses etc.

1.6. IVR scalable up to 300 Ports.

1.7. Solution should be designed to provide uptime 99.99% monthly.

1.8. Vendor should provide all required patches and solution upgrade without additional cost for minimum period of one year.

1.9. Primary system's (Gurgaon) IVR must support PCI-DSS compliance for secured transactions over IVR.

1.10. Solution should be capable to install on VMWARE virtual architecture.

1.11. Solution should be capable to save recorded files to any Storage (SAN or NAS) equipments.

1.12. As per Canara HSBC standard, solution will be installed on Canara HSBC harden servers, if any problem is countered during the installation and the vendor will required to take corrective action including reinstall solution of the entire solution.

1.13. Solution should be hardening basis on industry best security practice.

1.14. Solution should be capable to extend multiple outbound calling locations.

- 1.15. Vendor should provide administrative training of solution to the Canara HSBC technical team (Participants 3-5).
- 1.16 Vendor should provide agent and supervisor level training to the Canara HSBC users (Participants – 120).
- 1.17. Solution should have voice mail capabilities with minimum 2000 minutes.
- 1.18. 24x7 - One year onsite warranty and support of the proposed solution.
- 1.19. The OEM of proposed solution should be in Contact Center technical solution business for more than five years in India.
- 1.20. The proposed solution should be latest version.
- 1.21. Due to any reason If OEM releases new version of proposed solution within warranty period, the bidder will upgrade the proposed solution with new version without additional cost to the company.
- 1.22. The warranty and support of the proposed solution will start from the date of successful installation and acceptance.
- 1.23. Capability of recording files & report archival
- 1.24. All licenses (agents, trunk etc.) should be permanent and there should not be any license renewal cost involved.
- 1.25. PRI Gateway or similar hardware should be part of the solution.
- 1.26. The solution should be capable to work in Active (Gurgaon) – Active (Hyderabad) mode as and when required.
- 1.27. Proposed solution should not have any third party component for core contact center functionality. Solution should have same OEM owned ACD, Dialer, IVR, Voice & Screen Recording & multi-media capabilities.
- 1.28. Proposed solution should use hardware supporting 'Universal ports' i.e. same telephony port capable of either inbound, outbound or IVR calls.
- 1.29. Hardware interface with PSTN should be capable of E1/T1 protocol as well as SIP (SIP 2.0, G.711 or G.729)
- 1.30. Proposed platform should be unified and capable to support email, web chat, SMS & fax integration which may be required in future.
- 1.31. Proposed solution should support blended agents i.e same agent should be able to handle inbound, outbound interactions based on priorities.
- 1.32. Proposed solution should be support software redundancy at site level.
- 1.33. Proposed solution should support exclusion management (DND) for outbound calling.
- 1.34. Proposed solution should be easy to manage with single GUI.
- 1.35. BHCC (Busy hour call completion) rating of 1,50,000+ for the proposed platform.

## 2. Specific Requirements:

S.No.	Item	Description	Requirement Status	Vendor Response - Compliant/ Not Compliant	Remark/ Deviation
	2.1. Inbound & Outbound call recording	Recorded file header should incorporate with 10 digits Proposal No., same will be enter by agents during the inbound or outbound calls. * Note: System should ask user to enter Policy number during the call.	Mandatory		

	2.2.IVR Campaign Call Blaster	Excel Sheet will be uploaded in campaign server to refer dialing number and variable fields (Customer Name, Policy Plan Name, Policy No., and Amount Due Date) with multi language script (Hindi, English, Tamil, Karnataka, Punjabi and all other Indian Languages)	Mandatory		
	2.3.Dialing Mode	Predictive, Preview & Progressive Dialer Popup – Basic CTI information (Data uploaded in Campaign Server) should be popup to agent screen while call is connected.	Mandatory		
	2.4.Recording	Recorded files search should be aligned with the Proposal No.	Mandatory		
	2.5.Reports	a.Call by Call reports (Detailed report for particular call) for Inbound and Outbound calls.	Mandatory		
		b. Inbound abandoned report	Mandatory		
		c.CDR Reports for Inbound, Outbound – Manual or Auto dialing	Mandatory		
		d. Basic Reports: - Interval level report on calls offered, answered & abandoned - Service Level & Abandon Rate for any date range - Interval level on Avg Handling Time, Avg Talk time, Hold Time, Avg Wait Time - Individual level call tracking in terms of arrival, abandon & answered - Report on schedule adherence - Report on abandon in queue - Specific report of login time, avail time, break time, hold time etc - Productivity & utilisation report - ACD to display real time information on agent status for better supervisory controls - Functionality of call wait message to be timebound i.e message to state clearly the length of queue time - Toll Free Details (Airtel/BSNL) - Interval level report Voice Mail Received & Answered - Interval level report Transferred calls - Average Wrap Up time - Interval level report Short Calls - Occupancy Rate agent wise - Report on follow up calls			
	2.6.Voice Mail	a.Voice mail should save in file format to download.	Mandatory		

		b.Voice mail report end of the day.	Mandatory		
	2.7.Other	a.Abandon call recovery (automatically capture the phone numbers of customers that hang up via a recovered call list).	Mandatory		
		b.Music on Hold	Mandatory		
		c.Queue Optimization & report with all number details (give customers the Company to be called back based on their estimated time in queue or at a later time of their choosing).	Mandatory		
		d.Queue Position Notification (Relays to caller their real-time queue position and waits time in the queue. Example – “You are caller number 5 in queue.”  e. Call transfer facility between Agents (In & Out)  f. Erlang calculator or similar software/ functionality integrated with the system.	Mandatory		

### 3. Common Features Requirements:

S.No.	Item	Description	Requirement Status	Vendor Response - Compliant/ Not Compliant	Remark/ Deviation
		a. ACD functions <ul style="list-style-type: none"> <li>• Caller ID</li> <li>• Called number</li> <li>• Skill based distribution</li> <li>• Expert agent-Most idle agent</li> <li>• Expert agent-Least occupied agent</li> </ul> Available agents <ul style="list-style-type: none"> <li>• Oldest Call Waiting</li> <li>• Calls should be automatically distributed among agents with assigned skill groups.</li> <li>• System should allow agents to log in to multiple skills with different levels of priorities for the Skills.</li> </ul>	Mandatory		

3.1. Inbound & 3.2.Outbound	b. Initial usage of IVR: Basic Announcements for Inbound Call Tree and IVR campaign blaster.	Mandatory		
	c.Voice Mail	Mandatory		
	d. Dialer (Predictive, Preview, Progressive, etc...)	Mandatory		
	e. Manual Dialing	Mandatory		
	f. Basic CTI (Screen pop)	Mandatory		
	g. IVR Campaign- Call Blaster.	Mandatory		
	h.ACW codes - System should also provide an agent to identify different modes of after call by punching in codes and the same must be reflected in the reporting tool.	Mandatory		
	i.AUX codes - System should provide an option for the agents to take breaks by punching in codes and the same must be captured in the reporting tool. System must not allow agents to go in to a break mode without punching the reason for taking the break	Mandatory		
	j.IVR must support PCI-DSS and PCI-PTS compliance for secured transactions over IVR.	Mandatory		
	k.IVR must support accepting DTMF Input.	Mandatory		
	l.IVR must support 'N' levels of IVR tree branching.	Mandatory		
	m.IVR should be able to integrate with various backends over ODBC/JDBC or Web Service methods. Mention the supported mechanisms.	Mandatory		
	n.The system can detect a busy,no answer ,network announcements ,switched off phones ,“this number is not reachable” and related announcements ,answering machines and dispose separately in report.	Mandatory		
	o.The system should be able to play a queue music to the customers in queue.	Mandatory		
	p.Agent should be able to transfer an active call to any agent or supervisor.	Mandatory		
q. Agent should be able to conference a live customers with supervisors or IVR for payment(3rd Party IVR) or any other dialing no.	Mandatory			

		r.The monitoring software should be able to give campagian records in the call table, records selected, records dialled, records left and recalls left along with the summarized total for each column.	Mandatory		
	3.3.Recording	a. 100% Voice recording (In & Out)	Mandatory		
		b.5% Screen Capture with flexibility to random picks and applies to selected agents (In & Out).	Mandatory		
		c. With Customized header	Mandatory		
	3.4.Reports	a. Real Time Reports	Mandatory		
		b. Historical Reports 1.All status of agents (idle, talk, wrap, not ready/not available, hold, etc) are captured and displayed in the standard reports.	Mandatory		
		c. Customized Reports	Mandatory		
	3.5.Quality Management	a. Silent Monitoring, Coaching, Barge-In	Mandatory		
		b. Remote Monitoring	Mandatory		
		c. Screen Monitoring and Recording	Mandatory		
		d. Agent Performance Scoring and Analysis	Mandatory		
		e. Specify the Quality Monitoring tool and its scope.	Mandatory		
	3.6.Others	a. Integration with database	Mandatory		
		b. Integration with Payment Gateway	Mandatory		
		c. SMS, Fax, Email & Web Integration	Mandatory		
		d. Web integration <ul style="list-style-type: none"> <li>• Web Chat</li> <li>• Web Call me, Web Callback</li> <li>• Chat Recording and monitoring</li> <li>• Email Management</li> <li>• Auto Response</li> <li>• Confidence Level Control</li> <li>• Auto Acknowledgement</li> <li>• Assisted Response with suggestions</li> </ul>	Mandatory		

			Mandatory		
	3.7.Administration & Maintenance	a.Centralized management, configuration and administration			
		b.Remote maintenance facility	Mandatory		
		c.Systems should support Web based maintenance and administration	Mandatory		
		d.Should have different access levels for administration	Mandatory		
		e.Should have log facility	Mandatory		
	3.8.Monitoring	a.SNMP support for monitoring all major services in System	Mandatory		
		b.SNMP support for sending traps to report alarm.	Mandatory		
	3.9.Platform Support	a.System should be based on open standards.	Mandatory		
	3.10.Operating System Support	a. Should Support for MS windows. Mention what all types of OS can the system support.	Mandatory		
	3.11.Database Support	a.Support for DB2 and Oracle.	Mandatory		
	3.12.Power Supply	a.Gateways to have dual power supply provision	Mandatory		
	3.13.Backup and restoration of complete system	a.Ability to take backup (calling list, configuration and complete systems) and Restore of backups	Mandatory		

#### 4. Required extended capabilities in proposed solution:

- 4.1 Solution should be capable to integrate with DB2 and Oracle databases.
- 4.2 Integration with Payment Gateway.
- 4.3 IVR and CTI Integration with Database.
- 4.4 Web Application Integration.

## 5. IT Infrastructure to be provided by Canara HSBC:

- 5.1 Agent Desktops with below specification:
  - a. Win XP professional with SP3
  - b. Intel core 2 Duo processor 3.33 GHz 6 MB L2 cache
  - c. Memory: 4 GB DDR2 PC2-6400 (800MHz) RAM
  - d. Hard disk - 160 GB @ 7200 RPM
  - e. Integrated HD Audio
  - f. 2 USB Port
  - g. DirectX v 9.0 & above
  - h. Colour Monitor / Mouse /Keyboard
  - i. Functional 10/100 Mbps network interface card configured for dynamic IP
  - j. Appropriate & fully functional MacAfee latest version with regular updates
  - k. IE 6.0 SP1
  - l. VLC , Flash Player, Lotus 6.5 or above ,
  - m. MS- Office Standard,
  - n. Win Zip 12.0,
  - o. Anti Virus with regular updates
  - p. Adobe Reader 8.1.2 or 9.0,
- 5.2 Agent USB HeadSets for SoftPhones.
- 5.3 LAN, WAN connectivity and security infrastructure at Gurgaon & Hyderabad location.
- 5.4 Recommended Servers Hardware, VMWARE, Windows Server OS and Storage.
- 5.5 Voice prompt for IVR Call Tree and Agent less Campaign Call Blaster.

### ANNEXURE II-PRICING FORMAT

#### a) Price of proposed solution with Option-1 (Outsource location: Gurgaon):

S.No.	Description	Amount (INR)
1	Contact Center Solution - As per defined SCOPE (Please attached the BOQ with cost break-up)	
2	Installation Charges/ professional service charges	
3	Other charges, if any , please specify	
<b>Total</b>		

#### b) Price of proposed solution with Option-2 (Outsource location: Outside of Gurgaon)

S.No.	Description	Amount (INR)
1	Contact Center Solution - As per defined SCOPE (Please attached the BOQ)	
2	Installation Charges/ professional service charges	
3	Other charges, if any , please specify	
<b>Total</b>		

**c) Quote separately with warranty for following components:**

<b>S.No.</b>	<b>Description</b>	<b>Unit Price (INR)</b>
1	Agent License – Inbound	
2	Agent License – Outbound	
3	Agent License – Voice Blend	
4	Supervisor License	
5	Agent voice recording license if applicable	
6	DR – Inbound Agent	
7	DR – Outbound Agent	
8	IVR Port License if applicable	
9	<p>a) Add-on PRI Card in Gateway/ Audio Codes</p> <ul style="list-style-type: none"> <li>▪ 2 – Port</li> <li>▪ 4 – Port</li> </ul> <p>b) Any other associated license or hardware cost for add-on PRI port or Trunk</p>	
10	Professional services charges (per man hour) like customized report, enhancement, integration & new requirement etc. (Other than mentioned in SCOPE)	
11	PRI Gateway or similar equipment hardware	
12	What will be AMC & support percentage after expiry of product warranty & support period with regards to the Product cost?	