

RFP for Outsourcing of Outbound Calling & Related Services

Queries & Responses- RFP for Outsourcing of Outbound Calling & Related Services

Pre-Bid Meeting held on 12th January, 2021

Queries on Scope		
Sr. No.	Query	Responses
1	Kindly share expected month or the week volume to be considered for total dialed (inclusive of multiple attempts) or the leads count (unique lead counts) on which outbound will be required for sizing purpose at language, Sub scope & Call Category level. total no of seats required for this project.	The volumes are based on SBI Life's business and this cannot have predicted now. The participants can refer any available data in public domain.
2	Kindly share connect AHT to be considered bifurcated into Right Party Connect AHT and Non-Right Party Connect AHT at Sub scope & Call Category level.	It is as per the standard industry practices. There will be some variation from scope to scope.
3	Kindly share the connect % bifurcated into Right Party Connect % and Non-Right Party Connect % at Sub scope & Call Category level.	Based on our past experience all SBI Life customers are contactable.
4	Please share maximum number of attempts to be made for a non-connect outbound and share attempt wise connect % at scope & Call Category level.	Call intensity will be decided by SBI Life as per the business exigencies for different LOBs. The same will be communicated to the service provider at the time of empanelment.
5	It is mentioned that outcall will be made through Predictive/Preview Dialer, please share volume split between the two dialers to accurately calculate the sizing at scope & Call Category level.	The process will be discussed & mutually agreed upon with shortlisted participants.
6	Kindly confirm AHT to be considered for Non-Connected calls made through preview dialer. E.g. - 30 secs or 45 Secs.	This point will be discussed and mutually agreed post onboarding.
7	Kindly confirm scope of multi-skilling between Languages, Processes, sub scopes & Call Category level.	We are not insisting on multi skilling.
8	For query resolution and product information, will the knowledge base application be provided by SBI Life. If not define the expected scope of knowledge base to be developed	The standard FAQ's and calling scripts will be shared by SBI Life for each scope and sub-scopes.
9	As per our understanding of Point 5 of the clause dedicated agents will be required for handling HNI Customers & Lapse Policies calling. Please validate. If Yes, then please share percentage of volume expected to be of this customer category out of the total volume.	This will be approximately 10 to 15% of the total base. However, this will vary depending upon business volume of the company.

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10	Need to reconsider the 25% ramp-up and ramp-down basis to the actual FTE count required. would you please specify what would be the timeline in terms of days given for ramp-up/ramp-down	This is required for smooth handling of the call volumes and timeline for ramp up / ramp down can be mutually decided at the time of empanelment.
11	What would be mode of transferring database for calling?	Through SFTP
12	Participant have to provide telephony infra including PRI lines, please confirm	Telephony infra & PRI lines to be procured & managed by service provider only.
13	The requirement is for Scope A – Tele-calling services and Scope B - Cheque Pickup services. Is it mandatory for the participant to bid for both the scope or can the participant bid for only one scope	Participants can apply for both or only for one scope.
14	Which locations/ cities do you want the tele-calling services to be provided. Any preference in location. Is there flexibility for the participant to provide the Tele-calling services from multiple locations	It is up to the service provider. Participants to submit list of locations in technical proposal from where SBI Life processes will be carried out. Participant can operate from multiple locations. The data to be shared centrally from one Center & there should not be any compromise on the call quality.
15	It is mentioned that Contact details of the Non-Contactable customers will have to be verified from scan copy of the Proposal form (made available by SBI Life) in case required and calling to be done on verified / corrected numbers. How the scanned copy will be made available to us?	This is a very minor part of the scope and can be looked upon once the onboarding is done.
16	Sub-contracting & Partnership for related services allowed or Not ?	Not allowed
17	Request to change ISO 27001 mandatory as Bidder/OEM or consider in process ISO 27001	It has to be as per information security guidelines shared by SBI Life in the RFP document.

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Queries on General Requirements		
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1	Participant have to provide headset for agent, is there any specific headset requirement? If yes, please share make & model of headset.	This point is not about specific model, the expectation is to avoid any disturbance on the call while speaking with customers. While call records are retrieved and heard, it should be clear without any background noise.
2	Workflow tool for digitization and verification to be provided by SBI Life or participant needs to factor the same. Please elaborate the specifications on the electronic workflow required for the work distribution	These are internal applications and CRM of the participant and to be managed at their end and the details can be shared with us in the Technical proposal.
3	If client requires Work from home solution as backup, please specify what percentage %	Our aim is uninterrupted business service. It is up to the service provider to decide on the WFH solution.
4	Training Queries -Will the Training be a system based -Will there be an OJT phase post training. - Please define the TTT Process & request SBI Life trainers to extend support for Pilot Batches - Is the minimum 07 days training applicable for all the LOBs including HNI customers, Lapse Policy? -What is the trainer to tele caller ratio?	SBI Life shall provide initial knowledge transfer to trainers of service provider. Subsequent training will be responsibility of empaneled service provider. (TTT) will be part of training. SBI Life will provide necessary support. Service provider to come up with requirement of training based on their interaction with customer. 7 days of training as mentioned in the RFP document.
5	Will a knowledge management tool be provided by SBI Life where the scripts would be hosted?	SBI Life will share the approved calling scripts & FAQ's which can be stored in serviced provider's CRM and should be easily visible to the caller while speaking to the customers.
6	Can we propose the certification program or will the SBI Life team advise?	It is up to the service provider to set up agent certification process. It is not mandatory but participants should maintain quality of service.
7	Can we explore Virtual Training (Train at home)?	Yes, can be done.
8	Is IRDA or any other training mandatory for all resources aligned to this account. Also help us understand the IRDAI guideline as requested. We can prepare the solution accordingly	IRDAI training is not mandatory.
9	Kindly define the Call quality benchmark	Quality, Measurement will be shared by SBI Life & with Service Providers before empanelment.
10	Quality evaluation form and Quality SOP or it will be provided by SBI Life or the participant	This can be discussed after onboarding of the participants.

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11	How many evaluation is needed per agent in a month, whether we will follow 2 calls per agent per week i.e. 8 calls in a month. Kindy confirm	Not part of the RFP.
12	Other than Team Leader and Quality Analyst profiles, please share your requirements of other support profiles like trainer, assistant manager, training & quality AM along with ratios	This is explained in the RFP document. To provide efficient service, the participants can decide upon their internal support staff strength.
13	Training period of tele-callers would be billed by Partner at agreed FTE rate	Yes. The training period can be billed.
14	Would there be One time Allocation of Data for the Month?	The allocations will be shared on daily basis through SFTP. It is ongoing basis.
15	Is SBI ok for variable model for renewal calling	No, It is based on per seat cost only.
16	In welcome calling do we need to ask the medical related questions	At present it is not there. Even if it is added in future, it may not require any specialized knowledge for the tele-callers. SBI Life will provide calling scripts.

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IT Related Queries		
Sr. No.	Query	Response
1	Please provide list of SBI Life systems that will require integration with participant's CRM for seamless contact Centre operations. Also specify the mode of communication required for integration. If yes, please provide the integration points with the applications and other peripheral systems which SBI Life has and needs participant to integrate For integration, type of support/documentation and APIs provided for the existing software? Front end and back end of client systems and supporting technology for integration.	Integration will be taken up as and when required as per the business requirement.
2	Do the agents require any licensed applications like MS office, etc. for BAU?	Participant(s) to evaluate the need for other licensed applications. SBI Life will provide calling data in flat files (csv / dat / txt / etc.) which needs to be uploaded in the required systems centrally.
3	Is there any specific requirement of hardware/software/application for BAU? Please clarify	Please refer RFP for hardware / software / application related specifications.
4	CRM Application and Database to be hosted in participant data center or SBI Life data center	At participant(s) Data Centre.
5	Will there be any Email management? If yes, SBI Life Email access and credentials be provided by them? If yes, what would be the connectivity between client email server and our CRM server? Will it be internet based or through MPLS?	No
6	How many users from SBI Life will be accessing the call center application	Only the Proposal search option to be provided to the approximate 190 users to check the live calling status.
7	Do we need to integrate with any Social Media Platforms? If yes please list down	No
8	Expected Number of Report Users, who would require access to the reporting tool	Approximate 10 users require access of Reporting tool.
9	Confirmation required on CRM, since one section mentions of SBI Life CRM to be used (Page 6) If participant to provide CRM then can we propose CRM on shared server infra with logical segregation?	Participant(s) to provide CRM and other required software.
10	Call recording retention period is 90 days and after that SBI Life require recording on SFTP in that case who will be providing the SFTP storage for transferring the call recordings?	Call recordings to be retained by participant(s) for one year with first 90 days, the call recordings to be made available through front end applications. After a year, the call recordings will be copied in a tape drive provided by SBI Life.

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11	Please confirm who will provide connectivity (MPLS/P2P/Internet) between participant data centre to client data centre to access client provided applications?	System integration will be through APIs.
12	WAN participant have to provide components (router, firewall, etc.) at these data centers, and client will manage & provide WAN components at client's data centre, please confirm	To be provided by the participant(s)
13	Participant should have facility to push the SMS with bitly link at their end. Bitly link will be static or dynamic and if it is dynamic then what are all the parameters	Bitly Links will be Static in nature.
14	Provisioning of Internet Bandwidth per workstation, if needed.	Participant(s) to evaluate the internet Bandwidth requirement for accessing SBI Life SFTP from a centralized location / system.
15	Are there any software used in current scenarios, will those software be provided to the vendor?	Participant(s) to provide CRM and other required software.
16	Will there be a need to have OWASP certification test done on periodic maintenance updates OR just major updates to the CRM?	OWASP is a standard which needs to be followed as stated in the RFP document. With regards to Vulnerability Assessments frequencies to be followed as stated in the RFP document. (Reply received from info-sec)
17	Will there be a need to have OWASP certification test done for each bi-annual period or can it be yearly period?	OWASP is a standard which needs to be followed as stated in the RFP document. With regards to Vulnerability Assessments frequencies to be followed as stated in the RFP document.
18	Please share Access Control Procedure of SBI Life	Policy Procedure to be shared post finalization of the Bidder/ Participant
19	Is there any restriction to use open source web server / open source platform to develop the database and CRM?	<p>Note on Open Source, Freeware/ Shareware</p> <p>i. Open Source</p> <ol style="list-style-type: none"> 1. Comprehensive security review including VA-PT and SCD level configuration testing should be carried out before go-live and the same should also be conducted on an annual basis. 2. Latest security patches/updates/upgrade should be applied <p>ii. Freeware/ Shareware</p> <ol style="list-style-type: none"> 1. Comprehensive security review should be carried out before go-live and the same should also be conducted on an annual basis. 2. Latest security patches / updates / upgrade published by the owner organization should be applied
20	Bandwidth requirement approximation with help us or indicative	Participant(s) to evaluate the internet Bandwidth requirement for accessing SBI Life SFTP from a centralized location / system.

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Eligibility & Evaluation Queries		
Sr. No.	Query	Response
1	Client references required should be only for the scope of work or any other outbound tele calling activities can be considered	Any outbound calling client reference can be considered.
2	Will SBI Life officials access the contact center statistics dashboard using an open internet connections?	This will be decided and agreed upon after the onboarding.

Queries on Response to RFP		
Sr. No.	Query	Response
1	What is the minimum volume commitment to each service provider? What has been the past 12 months' average FTE count for the Scope A Whether the preference will be given to partner bidding for both since option to bid any 1 scope has been provided and hence need clarification	There is no minimum business guarantee will be given from SBI Life. The participant can bid only for one scope or both the scopes.

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General Queries		
Sr. No.	Query	Responses
1	Telecom one time and recurring charges will be paid by service provider. We recommend to keep these charges separate and at actuals	Telecom charges to be borne by participants only.
2	What is the definition of per Seat? Is it 184 hours or 200 hours/month	As per RFP and SLA.
3	How are queries routed to specific handling officials or SME's, in case CCE is unable to resolve the query, is there an escalation matrix and what is the mode of communication. Do we need to develop a portal, accessible to SBI Life SME for service requests created by contact center	Script and FAQ will be shared by SBI Life.
4	Please confirm if consented database will be provided and participant not to be held liable for scrubbing it against the DNC list.	Basic Data scrubbing is expected. DND scrubbing is required as per guidelines from SBI Life.
5	Provide Current Performance for all metrics	Not in the scope of RFP. Best industrial practices will be followed.
6	Process Maps for each call type / scenarios are required	This can be decided and agreed upon after the onboarding.
7	What is tentative "Go Live" date of Operations?	The service provider should go live with first batch within 4 weeks from LOI sign off.
8	Prior intimation of audits/inspections is required and extracts can be shown	Audit as per RFP and SLA.
9	As per RFP, service provider shall indemnify against any loss/ damage should be changed to service provider shall indemnify any actual and direct damages	As mentioned in the RFP.
10	We propose capping of 1% billing amount on all third party claims incl. court/legal fees	This will be as per RFP document only.
11	Clarity required for dispute resolution as it is mentioned that decision of SBI life shall be final which is contradictory to Cl# 13.24 which allows to go to arbitration/ Mumbai court	As per RFP Document.
12	As mentioned, failure to milestones/ acceptance SBI free to engage any SP and may claim damage from Cogent. We suggest that either party can assign after consent of other party and damages/overall liability need to be capped	As per RFP Document.

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Commercials & Billing Process		
Sr. No.	Query	Response
1	As per our understanding of the clause an FTE is required to deliver 8 hrs. of production time for 7 days a week i.e. 56 hrs./Week. Please validate.	As mentioned in the RFP document.
2	What will be the payment duration	Monthly Billing.
3	As the calling activity involves collection and retention calls, we assume that the payout model is fixed not variable. Please confirm	Payment is based on number of Seats Per month.

SLA & Penalty		
Sr. No.	Query	Response
1	We suggest to have a 90 days' beta period on performance SLA's. Please confirm	It is expected that BETA period will be of 30 days from GO LIVE Date.
2	Please share the list of performance SLA's and last six months/ one year trends of the same	Indicative SLA shared in the RFP Document.
3	Please share the capping% of rewards and penalties. Also share the weightage of parameter wise penalty	Penalty scenario mentioned in RFP.