

Sl. No	RFP Page No	RFP Clause No.	Relevant extracts of respective Clause	Query/Suggestions	SBIL Response
1	31	Appendix-E, Point 7	Pattern analysis of various reputation risks/issues faced by SBI Life in the past 1 year	Will access to ORM partner's past dashboards, tools, and case logs be provided for effective pattern analysis?	Relevant data will be provided to auditor at the time of audit.
2	31	Appendix-E, Point 12	Comparative analysis of SBI Life and peer set; max 5	Are the 5 peer insurers to be identified by SBI Life or can we propose based on relevance and availability?	To be mutually decided with selected vendor
3	31	Appendix-E, Point 11	Digital impersonation scan – mapping websites, assets impersonating SBI Life	Will access to IT security or brand protection tools be facilitated by SBI Life or expected to be done independently?	To be done independently by vendor
4	31	Appendix-E, Point 5	Timeliness or completeness of tracking of all events	Will SBI Life provide past escalation logs and event tracking systems currently in place for audit reference?	Relevant data will be provided to auditor at the time of audit.
5	31	Appendix-E, Point 10	Framework for addressing risk events – recommendations	Can you share the escalation matrix currently followed for reputational risks to align recommendations?	Relevant data will be provided to auditor at the time of audit.
6	32	Appendix-F	Fees to be all-inclusive excluding GST, no separate reimbursement	Please confirm if the price should cover all overheads including travel/stay for on-site deployment.	Yes, Price should be all inclusive of every thing, SBIL will not take any responsibility for stay accommodation, food, travel and out of pocket expenses.
7	31	Appendix-E, Point 6	Evaluation of immediate resolution process	Will real-time issue resolution be part of this audit or is it retrospective analysis only?	Audit will be conducted on past data to evaluate process for real time resolution.
8	9	Clause 9(ii)	Commercial Bid to be submitted in separate envelope	Can Commercial Bid be shared in a password-protected email rather than physical envelope submission?	Physical submission required
9	29	Appendix-D, Point 11	Social Media audits done at other insurance companies	Please confirm if audits of global insurance firms with Indian presence also qualify under this clause.	Yes global insurance companies also qualify for same
10	28	Appendix-C	Technical : Commercial eligibility criteria is 80:20	Please share breakup/parameters used under technical evaluation scoring (80%).	Eligibility criteria is mentioned in RFP. Technical evaluation will be done by selection committee.

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11	14	Clause 15(i)	The evaluation of Technical Bid will include assessment of the technical information submitted as per technical Bid format, demonstration of proposed Services, reference calls and site visits.	Kindly clarify what is expected to be showcased in the technical presentation and what parameters will be used for scoring, with reference points or weightage if available.	Eligibility criteria is mentioned in RFP. Technical evaluation will be done by selection committee.
12	NA	NA	NA	Are consultants expected to work on Bidder laptops/VDI systems, or will SBI LIFE provide laptops/access?	Systems will be provided by SBI Life. Audit will be done on premises.
13	17	25. VALIDITY OF CONTRACT:	The Contract shall be valid for the period of one year(s) unless terminated early as per the specific contract terms.	What is the Audit period, timeline start date and duration for the audit?	It will be decided with discussion with selected vendor
14	31	Appendix E	Appendix E - Scope of Work Point 2	Which social media platforms are to be included in the scope (e.g., Facebook, Twitter, LinkedIn, Instagram, YouTube, etc)?	All social media platforms to be included , objective is to ensure coverage.
15	31	Appendix E	Appendix E - Scope of Work Point 2	Do you have a system to handle the social media? Are there any vendors for handling of social media campaigns / complaints / Leads etc?	Yes, there is a process and system in place yes
				How many vendors are expected to be covered?	all vendors involved in this activity.
16	31	Appendix E	Appendix E - Scope of Work	Do you expect auditors to review Social Media Budget Analysis, along with cost benefit analysis, Lead Generation and Conversion?	Not part of scope
17	31	Appendix E	Appendix E - Scope of Work	Would website be a part of social media audit?	yes
18	31	Appendix E	Appendix E - Scope of Work	Are there predefined templates, audit tools, or reporting formats to be followed?	Expected to use consultants own format , Minimum basics to be covered is, Overall opinion, scope of improvement followed by executive summary for management, observations with background, risk rating , impact, risk , recommendation, management response, person responsible etc.

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19	31	Appendix E	Appendix E - Scope of Work	What would be the sampling Methodology?	Audit should provide assurance on Social media processes. Auditor can select sample required for giving assurance / audit.
20	31	Appendix E	<u>Appendix E - Scope of Work</u> Comparative analysis of the reputation management process, classification and posts by SBI Life and peer set. Analyse handles messaging themes and processes of peer sets (maximum of 5). To provide counsel and learnings for future process improvements.	Can you please clarify further?	To be mutually decided with selected vendor
21	12	iii. Bidders may please note	(b) While submitting the Technical Bid, literature on the Services should be segregated and kept together in one section	Can you please clarify further?	Details to be provided should be segregated while sending Technical bid.
22	33	Appendix - G (Contract / Service Agreement)	N/A	Though the RFP document refers to Contract/Service Agreement as the document to be considered as the Definitive Agreement between the parties, the same is an image format and is therefore not an accessible file. It would be viable for the same to be provided so Bidder can indicate provisions where Bidder may require to negotiate the terms of the definitive Contract once the RFP is awarded. These would be only to address very critical items (Limitation of liability, Pre-existing IP rights, etc). Request you to clarify this.	Will be shared

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23	35	Appendix - H (Non-Disclosure Undertaking)	The Bidder shall indemnify SBI Life, its directors, officers, employees, subsidiaries and /or affiliates and hold them harmless against any loss or damage that SBI Life, its directors, officers, employees, subsidiaries and /or affiliates may sustain on account of any leakage of confidential information pertaining to and supplied by SBI Life or on account of any violation of intellectual property, confidentiality, privacy, patents, trademark etc., by the Bidder in respect of any Intellectual Property, practices, hardware, software, systems, process, technologies, etc. in whatever manner described.	There is an Indemnity provision in the Confidentiality Undertaking which we would request to delete/modify as the NDU is not a definitive agreement for services which would contain relevant provisions to address risk. In case there is breach of confidentiality or IP obligations at the bidding stage, there would always be recourse via damages or injunction through the court which would be the apt recourse. Request you to clarify if this could be accommodated?	At the time of entering contract this clause can be discussed with our legal team and your legal team.
24	7	Clause 1 – Invitation to Bid	Consortium bidding is not permitted under this RFP.	Would subcontracting specific components (e.g., digital scans) be considered a violation of this clause?	No
25	27	Appendix C – Technical Eligibility Criteria	The Technical : Commercial eligibility criteria is 80:20.	Please elaborate on the evaluation methodology. Will there be a scoring matrix for technical evaluation? If yes, kindly share the parameters.	Eligibility criteria is mentioned in RFP. Technical evaluation will be done by selection committee.
26	27	Appendix E – Scope of Work	Analyse recent reputation issues that escalated in social media space & reputation classification mechanism	Could you please specify the sample size for the issues that need to be analysed, confirm that this sample size will be considered for the past year only	One year data to be analysed
27	27	Appendix E – Scope of Work	Timeliness or completeness of tracking of all events.	Could you please specify the sample size of events, as tracking all events would be difficult?	Sample size would depend on nature of data, this is one year data to be analysed exceptional sampling can be used

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28	27	Appendix E – Scope of Work	Pattern analysis of various reputation risks/issues faced by SBI Life in the past 1 year on social media (based on the data files and information shared by the current ORM partner) for review of communication framework, thresholds along with recommendation/guidelines for similar issues in future	1. Could you please specify the sample size for the pattern analysis 2. Will historical data and ORM partner reports be shared with the selected bidder for this analysis? If yes then how many reports which we can expect to review for analysis purpose.	1-Sample size would depend on nature of data, this is one year data to be analysed exceptional sampling can be used. 2-yes, Data will be shared with selected bidder and the time of audit.
29	31	Appendix E – Scope of Work	Digital impersonation scan - mapping websites, digital assets, social profiles...	1. Please confirm data will be provided by SBIL with respect to digital impersonation scans to bidder. If not, then do you expect from bidder to conduct scanning	yes, Data will be shared with selected bidder and the time of audit.
30	31	Appendix E – Scope of Work	Comparative analysis of the reputation management process... maximum of 5 peer sets.	Could you please confirm the names of peer organizations to be included in the comparative analysis, or should the bidder propose the peer set? Could we include a mix of insurance and non-insurance organizations to enhance social media best practices across the industry? Additionally, could you confirm the specific benchmarks or parameters for evaluation?	Peers can be selected by selected bidder further this should be in insurance industry and similar size and nature
31	33	Appendix G – Contract / Service Agreement (Template)	Service Agreement Template	Please provide the Service Agreement Template as we are not able to download from the pdf	Yes

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32		Additional Query		Kindly confirm if using of tool for Social Media is allowed in SBI Life Insurance environment. If any scans are required to performed then scanning exercise will be performed from vendor office location as tools would be installed at vendor labs.	SBI Life will not provide any tool. Vendor may use their tools required for audit. Tool will not be installed at SBI life environment.
33		Additional Query		During the engagement, remediation and revalidation of the gaps identified during the audit will be out of scope. Please confirm	Audit report to identify gaps and recommend best possible resolution.
34		Additional Query		Will SBI provide tools such as Power BI to perform analysis of Issues	No
35		Additional Query		We propose to conduct this engagement in a Hybrid mode i.e. Meeting would be conducted at SBI Life office. However, any tool or analysis that needs to be performed that particular exercise will be conducted at our office location	To be conducted on premises data will be shared on specific systems provided by SBIL
36		Additional Query		Audit report will be considered as engagement deliverable. Please confirm. If any other deliverables except from bidder. Please let us know.	Yes. Audit report covering the scope defined in RFP is final deliverable.
37		Additional Query		Social Media audit would be one-time assessment only. Please confirm	yes currently the RFP is floated for one time assessment
38		Additional Query		Could you please confirm the timeline or duration for conducting this audit?	Timeline will be discussed with selected vendor
39	2	Schedule of Events	Last date and time for Bid submission	Would it be possible to extend the timeline by one week to allow sufficient time for obtaining internal approvals and completing necessary formalities.	Extended till 8 July 2025 till 6:25 PM
40	8	2		We have observed that there is no mention of our liability under this engagement.	At the time of entering contract this clause can be discussed with our legal team and your legal team.


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		DISCLAIMER :			
				Hence, if we engage, would like to include below point in our contract, please confirm if it is fine with you.	
				"In accordance with standard industry practice, our aggregate liability under this EOI and in connection with the services shall be for direct damages only and shall, in all circumstances and events, be limited to one time the fees paid to us under the engagement. We shall not be liable for any indirect or consequential losses."	
41	12	9-iii-e	It is mandatory for all the Bidders to have class-III Digital Signature Certificate (DSC) (in the name of person who will sign the Bid) from any of the licensed certifying agency to participate in this RFP. DSC should be in the name of the authorized signatory. It should be in corporate capacity (that is in Bidder capacity).	Class-III Digital Signature Certificates (DSCs) are available only with a limited number of officials, is it considered valid and compliant for a document to be signed by the engagement partner if the attached DSC is registered in the name of another official of Vendor?	Bids are to be submitted in physical format signed by appropriate authority.
42	17	24	As per scope of this RFP, sub-contracting is not permitted.	The internal audit will be conducted by Vendor, however, we would like to confirm whether our subcontracting partner is permitted to process takedown requests on our behalf, should any arise. Kindly confirm if this arrangement is acceptable under the applicable guidelines.	No subcontracting is allowed



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43	26	Appendix-B	Eligibility Criteria - 3. Bidder should have experience of minimum _5_ years in providing the Services in field of Assurance and consultancy.	Could you please specify which types of work orders or completion certificates are required to validate the bidder's minimum 5 years of experience in providing assurance and consultancy services? Are there particular domains, formats, or issuing authorities we should consider?	Consultancy and assurance experience in Social Media audit, brand management and other relevant field will be considered
44	26	Appendix-B	Bidder Should be based out of Mumbai, with at least team size of 50 technically qualified person and Above.	For bidder firm / company having presence across India, Is there a requirement for the Auditor / Tester to be based out of Mumbai location ?	Yes. Audit is onsite at SBI Life premises. If Auditor or tester is out of Mumbai, SBI Life will not bear any expense of Residential, travel or out of pocket expenses.
45	26	Appendix-B	Bidder Should be based out of Mumbai, with at least team size of 50 technically qualified person and Above.	Is there a requirement for the Auditor / Tester to perform the Audit from SBI Life office location ? If yes, which SBI Life office location ?	Yes. Audit is onsite at SBI Life premises. If Auditor or tester is out of Mumbai, SBI Life will not bear any expense of Residential, travel or out of pocket expenses.
46	31	Appendix-E	Evaluation of immediate resolution process.	Kindly confirm whether there is an existing resolution process in place that needs to be evaluated, or if you would prefer that we introduce a new one.	Resolution process is in place, to provide assurance on effectiveness to be validated.
47	31	Appendix-E	3) Analyse recent reputation issues that escalated in social media space and reputation risk classification mechanism.	SBI Life shall be sharing the details of indicated recent reputation issues that escalated in social media space (example - Tweets / Post URLs, other details). Please confirm if your	Yes at the time audit all required available data will be provided for audit.

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48	31	Appendix-E	Pattern analysis of various reputation risks/issues faced by SBI Life in the past 1 year on social media (based on the data files and information shared by the current ORM partner) for review of communication framework, thresholds along with recommendation/guidelines for similar issues in future.	kindly confirm whether SBI Life would prefer us to develop a new communication framework and response plan, or enhance the existing one with targeted improvements and updated guidelines.	Vendor should come out with most appropriate suggestion covering best practices and more effectiveness.
49	31	Appendix-E	Check and analyse the stakeholder (employee; customer; regulator; partner etc.) centric classification system for reputation risks	Would you prefer a reputation risk scoring model that offers stakeholder-specific scores—such as for customers, investors, regulators, employees, and the public—or a single, aggregated score representing overall reputation risk?	Vendor can suggest value additions in addition to scope defined in RFP.
50	31	Appendix-E	Verify the thresholds for each risk category based on frequency, velocity of conversations, nature of the crisis, and external stakeholders involved (government, associations, customers, employees, partners etc.)	Would you like a full analysis of risk thresholds based on conversation dynamics, crisis nature, and stakeholder involvement, or is there a specific area you'd like us to focus on?	Yes
51	31	Appendix-E	Digital impersonation scan - mapping websites, digital assets, social profiles that are impersonating or unauthorized use of SBI Life's identities and are potential reputation threats from social media / information security perspective.	How many total number of accounts needs to be monitored?	On all platform covering all major once on which reputation risks are high
52	31	Appendix-E	Comparative analysis of the reputation management process, classification and posts by SBI Life and peer set. Analyse handles messaging themes and processes of peer sets (maximum of 5). To provide	By analysing handles messaging themes and processes of peer set, do you want us to analyse posts of your similar companies/competitors? If Yes, then are there any specific entities that you would like us to monitor?	Peer comparison with 5 Insurance entities, benchmarking with best in practice reputation management process.

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			counsel and learnings for future process improvements.	Please elaborate requirements mentioned in the point.	
53	31	Appendix-E	Analyse recent reputation issues that escalated in social media space and reputation risk classification mechanism.	Please confirm whether the scope of services includes a one-time assessment only, or if it extends to continuous monitoring and reporting for the given time?	yes currently the RFP is floated for one time assessment
54	32	Appendix-G	Contract Service Agreement Template	Please reshare Service Agreement Template as we are unable to open it currently.	Yes
55	35	Appendix-H	ensure destroying / purging of any confidential data received from SBI Life at the earliest of the closure of the bidding process or on the bidder getting eliminated from the bidding process.	<p>If we engage, we wish to include following clause in our contract.</p> <p>“We shall be allowed to retain sufficient documentation as part of our professional records to support and evidence the work performed by us. Such retention shall be subject to obligations of confidentiality mentioned herein.”</p> <p>Kindly confirm if this is fine with you.</p>	At the time of entering contract this clause can be discussed with our legal team and your legal team.
56		Appendix A		How many official and affiliate social media handles (including regional or campaign-specific) are in scope?	All are included
57		Appendix A		Is SBI Life currently using any social listening tools (e.g., Sprinklr, Talkwalker)? If yes, will the auditor be given access?	Auditor will be given data wherever applicable
		Appendix A		Is SBI life currently using any brand infringement tool? If yes, will the auditor be given access?	Auditor will be given data wherever applicable

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	26	Point 4	<div> <div>4</div> <div>Bidder Should be based out of Mumbai, with at least team size of 50 technically qualified person and Above.</div> <div>Name and qualification of team.</div> </div>	What will be the team composition for Social Media Audit and are there any specific certifications or qualifications required for the audit team?	There is no specific certifications / qualifications required. However concerned audit team should have knowledge / experience regarding Social Media Audit.
	31	Scope of Work		What are the specific timelines or milestones for the audit project?	Audit to be completed in 3 to 4 months
	31	Scope of Work		Can you provide more details on which social media platforms are currently being used by SBI Life and need to be covered in this audit?	All Major platforms to be covered further any such platforms that may lead to reputation issues should be covered
58				Any deliverables to be submitted apart from the Social Media Audit report?	Yes. Audit report covering the scope defined in RFP is final deliverable.
59				Are there any specific requirements for data collection, sampling, analysis, or reporting including any specific tools or methodologies to be used?	It will be decided with discussion with selected vendor
				Will the audit team require access to SBI Life's internal systems, and if so, how will access be provided?	Access will be provided on SBIL system, all data will be on sbil system
				Will SBIL provide laptops or devices to the audit team for the purpose of performing audit?	Yes, SBIL will provide hardened system
				What will be the expectation pertaining to Documentation and Working papers, etc?	All working papers to be maintained , Data request along with tracker, All data received, queries shared along with supporting's and responses, all observation in drat report and final report to be supported with evidence.
				What are the reporting requirements for the project, and what format should the reports take?	Format will be discussed with selected vendor
60				Will the audit be conducted on-site, remotely or in a hybrid manner?	Onsite

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61				Who are the key stakeholders for the project, and what are their expectations and requirements?	It will be decided with discussion with selected vendor
	31	Appendix E Point 11		Can you provide more information on the digital impersonation scan and its objectives? Are there any specific tools or techniques used that SBI Life would like the bidder to follow?	Auditor will be given data wherever applicable
				Are there any specific industry benchmarks or best practices that SBI Life would like the bidder to follow?	yes industry bench marking with insurance companies with similar size to best in industry practice
	33	Appendix G		The attachment provided in Appendix G of Social Media RFP is not accessible. Kindly provide the Contract/Service Agreement template	Yes
		Liability-Silent	<p><u>Appendix-G</u></p> <p><u>Contract / Service Agreement (Template)</u></p> 	<p>RFP is silent on the liability provision. We request the client to limit the liability of the bidder/consultant to 1x times of the consultancy fee.</p> <p>Client is requested to include the clause to state that we will not be liable for any indirect or consequential losses or damages. Even the Contract Act, stipulates remote and consequential damages are not payable.</p> <p>The above is as per GFR and MeitY guidelines and the industry standard.</p>	To be discussed with legal team once bidder is selected
62		Confidentiality	<p>1. We hereby certify that on the date of submission of Bid for this RFP, we do not have any past <u>present</u> material litigation which adversely affect our participation in this RFP or we are not under any debarment/blacklist period for breach of contract/fraud/corrupt practices by any Scheduled Commercial Bank/ Public Sector Undertaking/ State or Central Government or their agencies/departments. We also certify that we have not been disqualified / debarred / terminated <u>as determined by the final judicial order</u> on account of <u>proven</u> poor or unsatisfactory performance and/or blacklisted by any Scheduled Commercial Bank / Public Sector Undertaking / State or Central Government or their Agencies / Departments at any time, <u>during the last 3 years as on the date of submission</u></p>	<p>Bidder propose additional language as follows:</p> <p>"The Bidder may retain such portion of the Confidential Information including its working papers that is required for compliance with its statutory, regulatory or professional conduct obligations"</p>	To be discussed with legal team once bidder is selected

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63	24	Appendix A	Point # xi	Kindly revise the following extract	
64			<div>  <p>7. Power of by 202506051332_</p> </div> <div>  <p>Appendix H- Non losure Undertaking</p> </div>	<p>Since Firm has already shared NDA (Non-disclosure undertaking) and POA (Power of attorney) with SBI Life Insurance for a Management Audit, and the CSP will be the same for Social Media Audit, can we utilize the same documents for Social Media Audit as well? <i>(Attaching NDA and POA for reference)</i></p>	It will be decided with discussion with selected vendor