



Information Kerala Mission

Expression of Interest (Eoi) for Design, Development, Supply, Implementation of the Public Helpdesk, Call Centre Support System

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Information Kerala Mission

Information Kerala Mission is an autonomous body under the Local Self Government Department of Government of Kerala for developing & deploying e-Governance solutions and software for Local Self Government Institutions in Kerala. IKM today is pioneer e-Governance solution provider which has developed over 30 software applications to strengthen local self-governance through ICT (Information Communication Technologies) applications. IKM Developed, deployed and maintaining many applications software for the comprehensive e-Governance requirement of Local Government Institutions.

IKM has more than 300 technical resources in HQ and districts. Exclusive technical officer for ULBs and Technical officers in Block level to support all rural LSGIs. In addition, a Technical Assistant is also available for each 941 Grama Panchayats, appointed by the Grama Panchayat. Their technical control is with IKM and the administrative control is with the Grama Panchayat. The Technical Officers of IKM are expertise in this field with more than 15 years of experience.

Terms of Reference

The Software Integrator should develop and/or customize a proven commercial off-the-shelf (COTS) software and tools/applications for interacting with public, Department and media in integration with IKM Applications.

This includes:

- a. Call Centre & Helpdesk solution implementation.
- b. Massive communication solution and integrate with SMS, Email, WhatsApp, Website etc .
- c. Create and implement a ticketing tool for all incoming and outgoing queries.
- d. A centralized platform for collecting all the public queries and provide timely assistance.
- e. Development of a comprehensive grievance management system and its monitoring mechanism.
- f. Develop and integrate a complete knowledge management system for frequently asked queries.
- g. A high-level dashboard for monitoring the service levels and complaint resolutions.

Functional Requirement for the contact Center

IKM is planning establish High Tech Contact Center with all the features mentioned in the functional requirement and scope. The goal of the department is to increase the channels of communication with public & officers and ensure each query is handled and issue is resolved in a systematic way. The new system has been proposed to transform the existing conventional telephone setup into a state-of-the-art Contact Centre, providing such service delivery channels as e-mail, web portal, social media, online chat, SMS, WhatsApp etc. along with conventional voice enhanced by VoIP technologies.

The following access channels shall be considered in the CC:

- i. Inbound Channels: Telephone, Mobile, e-mail, SMS (Status tracking only), Chat, website, Mobile application, Social media, WhatsApp etc.
- ii. Outbound Channel: Telephone, e-mail, SMS, Mobile, Social media etc.
- iii. Online Portal: Integrate with existing application software.

Fundamental Functional Requirements

- i. This EoI's objective is to setup a state-of-the-art Contact Centre Solution with the requisite hardware & software including installation, testing, training to the stake holders, warranty and operations & maintenance. The system should support redundancy such that failure of one equipment/server should not affect the operation of the Director, Information Kerala Mission, including Availability, Ease of Use, Security, Scalability, Interoperability, Performance / Quality and Ease of Maintenance with minimum downtime.
- ii. All endpoint hardware and software components except CRM Servers should be placed in 14 district offices of IKM. The centralised CRM software shall be hosted in Kerala State Data Centre (SDC) located at Thiruvananthapuram or cloud. A dedicated point-to-point leased line may be provided between SDC & CC, if required. UPS, Electricity, Telephone lines through SIP trunk, T and Networking would be provided by the department, the Software Integrator should advice department to obtain the necessary infrastructure.
- iii. Information Kerala Mission needs to move to a comprehensive contact center solution that includes ACD, IVR, CTI, analytics, and quality functionality. The Software Integrator shall be responsible for all tasks related to initial setup, installation and maintenance of the solution for each group represented, including technical support and training of manpower of the Contact Center.
- iv. Information Kerala Mission desires a web-based feature application that permits changes to be made by department staff to the system configuration, including changing messages and agent management.
- v. Information Kerala Mission plans to have approximately 10 agents initially. The services shall be capable of scaling to larger configurations that are capable of supporting up to 15 agents and 25 nodal officers.
- vi. Agents typically log in to the contact center from within the office network. Department desires a service capable of supporting the ability to securely log in remotely from any telephone type and location.
- vii. It is expected that standard Call Centre technologies like & not limiting to components viz., ACD, Queue, Priority Queue, CRM solution, Call recording, IVRS, Workforce/Agent Management application, CTI, CLI Quality, Management solutions like Analytics / MIS / Real time Reporting features etc. will be available in the solutions offered by the bidders. The solution shall be scalable upwards to handle 2500 calls per day with call recording retention period of one year, configurable after ticket closure.

Viii. The solution proposed by the bidder should also take care of other general conditionality as below: -

- a) The warranty support is to be provided for three years from the date of successful UAT and Go-live of this Project.
- b) O&M support for a period of 2 Year shall commence from the date of Go-Live.
- c) Multiple service delivery channels such as e-mail, web portal, social media, online chat, Mobile App and SMS
- d) Ticket/Service Request monitoring system to track queries sent to user depts. for resolution.
- e) Documentation of processes & policies with strict adherence to the same
- f) Call back facility on request and for emergency calls.
- g) All inbound calls to the Contact Center are to be recorded, maintained for a specific period as per the policy (*as per data retention policy specified*) and tracked through the CRM.
- h) The IVR system should prompt the caller to choose from English, Malayalam, Hindi

Additional functional requirements are given below: -

- a. Interactive Voice Response System
- b. Toll free number 1800 xxx
- c. CC Agent Tools & CRM
- d. Interfaces
- e. Automatic Call Distributor / Computer Telephony Integration/
- f. Contact Center
- g. Recording System
- h. Knowledge Base
- i. Reporting and Dashboard
- j. Feedback Mechanism

Some additional non-functional requirements are also specified below: -

User Access Management

1. It should provide access to functions within modules restricted to authorized users.
2. It should provide logging by unique user ID and password. Access to users should be restricted to different levels (*as program, module, transaction etc.*)
3. System should notify security administrator/competent authority of unauthorized access or attempted access and record in a log with reporting.
4. System should provide multilevel security at agent, supervisors, administrator level etc.
5. System should allow for administration of system users including:
 6. Adding new users
 7. Deletion of existing users
 8. Modifying user profile & preferences (standard phrases, vacation mode)
9. System should allow for administration of content (categories/response templates – both text and html) including:
 - a. Addition of new categories/response templates
 - b. Deletion of categories/response templates &
 - c. Modify categories/response templates, FAQ's and Knowledgebase etc.
10. System should be able to support role-based access control.
11. The solution should have the ability to provide multi-level access management. The following should be provided: - User identification; Limitation of user rights to perform operations; Data confidentiality provision; User actions audit and protocols.
12. The system should have the ability to provide user and user group authorization & administration tool to assign security levels to functions and data, and allow the access by users / by groups with valid security level only
13. System should allow for administration of e-mail processing (queues/rules) including Addition of new rules to properly route and categorize messages/ Addition of new queues as organizational structure changes/Changing dynamics of queues as needed (i.e., timeout parameters, escalation, assigned users, queue priority) etc.
14. System should have ability to provide access level security for Entry forms at field level – allow/Read only/Hide. System should also allow providing access level security for reports at Field level - show/ hide. It should also support LDAP (Lightweight Directory Access Protocol) to allow systems access to the directory.

15. System should provide centralized repository of all identification and access control Data. Moreover, users should not be allowed to access the database directly.
16. The system should have the ability to assign activities to roles and map roles to users.

Workflow

1. The solution should support standard workflow languages and also should have the ability to integrate with existing workflow systems in the department.
2. The solution should be capable of invoking file status from other systems using web services.
3. The solution should have provision to push requests/complaints to workflow solutions through web services if required.
4. It should be possible to define the time frames for the responses and service levels for each and every service request pushed to workflow solutions.
5. The workflow should interface with email system supporting SMTP for sending out answers to queries and IMAP/POP for receiving the queries.

Performance

1. The user including Agents, needs to be able to launch the application quickly and log into the application with minimal latency time.
2. The solution should be able to deliver high performance as & when transaction volumes/ calls increases without compromising on the response time and call quality. System components should be able to take load during peak hours of CC.

Security

1. System should support configurable password policies including: Password expiry & Password history and reuse policy
2. System should display an appropriate warning message upon user logon. The warning message need not include the following general elements verbatim but must convey the same meaning: -
 - 1 Use of system constitutes the user's consent to monitoring.
 - 2 Use of system is limited to official Login use only.
 - 3 Notice that this is a Login system.
3. Session limits must exist for the application. For each session type, there must be limits, i.e., the maximum time length of an idle session

4. The system should be capable of providing Authorization by the Username, User Role etc.
5. The system should be capable of providing automatic timeout for user (i.e., log out)
6. The system should be able to allow definition of rules for password composition and password encryption
7. The database should support role-based access control & user-based privileges. The system should also have the option to encrypt data before transferring over a network
8. The system should have the option to encrypt the data stored in the database and there should be back-up and recovery of the data also
9. System should allow the supervisor to work (edit/modify/transfer) on the service requests assigned to the agents.
10. System should be VAPT tested and audited by a agency approved by the Government of Kerala.

Data Network

1. Network security should be maintained by having password and audit control on Network equipment – this will be the SI's responsibility.
2. Proper Antivirus security will be the responsibility of the SI.
3. SI should provide all items mentioned in Annexure-E.

Availability

The system uptime should be 99 % during working hours.

Scalability & Robustness

The solution should be highly scalable and robust which should be capable of delivering high performances& when transaction volumes/ callers increases without compromising on the response time.

Audit Trail

1. The system should allow archiving of queries which shall include both text and voice recording. Audit trail of archival with time and date stamp, to be automatically maintained by the system.

2. The system should allow recovery of data in case of hardware failure and data corruption. It should be able to perform recovery to a point of time, to known backup database.
3. The system should ensure that the audit files are stored in un-editable formats.
4. The system should be capable of providing Audit Trail: Audit trail of Time Stamp & User ID stamp for the following: - (a) Service Name (b) Status of the Query (c) Caller Mobile Number
5. The system should maintain audit trail of any update in the status of the query.
6. It should be possible to audit users at the form level, user level and at the Organizational role level.
7. Audit system should be centralized, secured and should provide detail insight in audit data (who did what, to what data and when)
8. The system should enforce separation of duties between auditors and administrator.
9. The system should provide direct access to the auditor's to view audit reports and should be able create custom reports
10. The system should have the ability to identify users that have exploited access privileges, identify root causes of conflicts and be capable of interrogating the security log.

Archival

1. The system should be able to archive data, based on user specified parameters (i.e., data range) and restore archival data when required.
2. The system should support change in database and should able to retrieve the archived data.

Training

1. After successful implementation of the solution, the SI should provide comprehensive, at-site hands-on training on the new system to the users (agents & other designated officers of department), which should cover the following:
2. Preparation of comprehensive training material (Text, Audio & visual)
3. Proper documentation of the entire process which can be used for training.
4. Any change request that has been implemented should also be documented.
5. The training of new user (agents/staff) also has to be carried out as & when needed.
6. All training materials to be finalized only after getting the approval of the competent authority in Department.

On-site support

The SI should provide comprehensive On-site support for a period of one year W.e.f. the Go-Live during office hours, and should be available over phone on other days and after office hours on working days. The person should be having at least 1 year experience in hand holding support of Call Centre support in the offered solution .

Indicative Call Flows at CC

The primary source of information for the agents shall be the CRM database. The call flow should follow the below mentioned process: -

1. Agents will access the FAQs (Knowledge Management System) created for the purpose while answering the stake holder queries.
2. If a call center agent is unable to answer any query, then call should be logged. The application shall automatically generate the unique service request number for all queries. The unique service request number shall be forwarded to the concerned department through e-mail or a login. The same service request number shall be shared with the caller through SMS & /or e-mail (as available) for further tracking of the request. Agent will also call the concerned line department and inform about the query raised to that particular department.
3. For the unresolved queries, there shall be a separate escalation matrix for each participating department. The escalation matrix and time resolution for the unresolved queries shall be finalized for each service after discussions between department before the Go-Live of the contact center Services.

The Agent shall then call the concerned caller and answer the query and then shall close the call in the call center application. A call is considered to be closed only when the query(s) have been answered by the agents and a confirmation has been obtained verbally from the caller to close the call.

General Instructions

Information Kerala Mission intends to appoint a single entity for the assignment, anticipating completion of this project within **3 weeks from the** date of issue of the Work Order/signing of the agreement. However, The IKM shall increase or decrease the scope of services under the assignment as mutually agreed between the parties concerned.

Pre-Qualification criteria

1. The bidder should be a Company registered under Ministry of Corporate Affairs (Copy of the Certificate of Registration or Incorporation duly attested by the Company Secretary/ Authorized Person / Power of Attorney of the organization should be provided in the "Pre-Qualification Cover" of the bid)

2. Consortium is not allowed.
3. The Bidder should have experience in providing call center solutions and also should have executed a minimum of three such projects/similar proposed solution in Government. Copy of minimum three relevant Work / Purchase Order/ certificate of completion from the respective Head of the Institution to be submitted in the “Pre-Qualification Cover” of the bid.
4. Scanned copies of the valid Registration of the Firm, License No., GST Registration No., PAN No. of the firm to be attached in the “Pre-Qualification Cover” of the bid
5. The bidder should not have been blacklisted by any Government department, organization, entity etc. (An undertaking duly signed by the Company Secretary/ Authorized Person / Power of Attorney of the organization has to be submitted to this effect by the Bidder/ both consortium partners in the “Pre-Qualification Cover” of the bid)
6. The Bidder should have experience in consulting, designing, developing & implementing Call Centre software solutions for Government of Kerala for (Supporting documents to be attached in the “Pre-Qualification Cover” of the bid).
7. The bidder should give commitment to deploy such people in this project who have steered at least three CRM project from ideation to implementation stage in a multi-disciplinary manner in government of Kerala in native language. (Undertaking on the same should be submitted along with the technical cover, giving name & other details)
8. The bidder should furnish its standing & goodwill through customer satisfaction certificates from its clients to whom services have been provided in the past (minimum three such client certificates on successful project completion & satisfaction should be submitted along with the technical cover)
9. The Company should have a minimum turnover of Rs. 2 Crore for a minimum of 3 years during the last three financial years, (Proof for the same should be submitted in the Pre-Qualification cover of the bid)
10. The bidder should have minimum of 10 years’ experience in the industry and providing contact center solution to the Government.
11. The bidder should also attach a “Manufacturer’s Authorization Form” in the *Pre-Qualification Cover* of the EoI.

1. The bidder should have mandatory GST and PAN (Copy of PAN card & GST duly attested by a Chartered Accountant/ Authorized Person / Power of Attorney should be submitted by bidder & consortium partner.
 2. Department reserves the right to carry the capability assessment of the bids and its decision shall be final in this regard.
 3. The Department intends to adopt a two-cover bidding process for selection of eligible bidders for the assignment, as per the Scope of Work set out in **Section 1** of this RFP document.
12. The proposals received from eligible bidders shall be evaluated based on the criteria set out in this RFP document. The bidder shall be responsible and pay for all of the costs associated with the preparation of its proposal and its participation in the bidding process
1. The Successful Bidder is required to enter into an agreement with Executive Director, Information Kerala Mission. The charges payable to the successful bidder by Director, Information Kerala Mission, shall be in the manner as set out in the said agreement.
 2. The period of engagement of the successful bidder will be 12 months, effective from the date of go-live of the CC, including warranty and O & M phases (*described elsewhere in the document*). Any extension beyond the 12 months should be mutually agreed to between the successful bidder & Director, Information Kerala Mission with adequate modifications in the pattern of payment disbursement
 3. The proposal submitted by the bidder shall remain valid for a period not less than 180 days from the opening of financial bid (Proposal Validity Period). The Department reserves the right to reject any proposal, which does not meet this requirement. The proposal validity period may further be extended on mutual consent.

Process of Submission

Interested service providers or authorized representatives of service provider are requested to submit their Expression of Interest (EOI), which should have the following sections:

1. Name and background of the vendor covering overall profile of technical proficiency.
2. An overview of the services proposed to be provided and the process of its delivery.

3. Supporting Documentations for Eligibility Criteria point wise and properly indexed.
4. Details of clients/ contacts/ references where the proposed solution has been implemented.
5. Details proposal of the solution.
6. A pre bid meeting shall be held through VC on 20-06-2023, 11.30 AM
7. The last date of submitting EoI on 29-06-2023, 3 PM