Request for proposals (RFP)

CRM Solution

Issued by
Telecommunications Regulatory Authority of the Kingdom of Bahrain

23 February 2011

Deadline for submitting proposals is:23 March 2011

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Telecommunications Regulatory Authority

Table of content

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1 TRA Background

1. The telecommunications market in the Kingdom of Bahrain has been transformed following Government policy to stimulate the national economy. In October 2002, a Legislative Decree No 48 of 2002 promulgated the Telecommunications Law that enabled liberalization of the telecommunications sector and the formation of the Telecommunications Regulatory Authority (TRA).

2. TRA is an independent body and has a direct responsibility to ensure effective liberalization of the telecommunications market, oversee fair competition, give private investors' confidence with regard to competition, and make available the related telecommunication resources, such as the radio spectrum, in a fair and transparent manner.

For more information, please visit: www.tra.org.bh

2 Contact Information

3. For any contact regarding this RFP:

Mr. Mohammed Nasser
Telecommunications Regulatory Authority (TRA)
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Manama - Kingdom of Bahrain
e-mail: itproject@tra.org.bh

3 Objective

The objective of this RFP is to allow TRA to have a CRM Solution to handle consumer enquiries and complaints and manage the investigation and resolution of consumer cases internally according the procedure determined in the Telecommunication Law. Record all enquiries and received complaints, track the status of each and keep the information about consumers and service providers. As additional value,, utilize the Marketing Module to manage TRA awareness campaigns and events.

4. To achieve this objective, TRA is looking **at implementing CRM** with the objective of allowing users to automate call center, complains handling and event management.

4 Requirements

General Requirements:

5. Provide TRA with a detailed work plan, clearly indicating roles and responsibilities, and the key project milestones with timing.

6. Provide expert CRM consultants / developers, optimization specialists, and communication experts to collaborate with TRA's team to identify the exact requirements, features and functionalities. This collaboration must be in person at TRA's premises in Bahrain;

7. Develop a CRM concept to be reviewed by TRA. Once agree, the draft design should be constructed based on it.

8. The user / TRA acceptance test will be conducted before the actual lunch of the system. The output of the test should be reflected on the implementation.

9. Business user(s) should be trained on the implemented solution. Appropriately authorised TRA staff should be able to update any information with simple tool and steps.

10. IT training should be provided for managing and maintaining the implemented solution.

11. The successful bidder will provide a transition plan to allow smooth lunch of the new system. The plan and dates of lunch should be agreed with TRA.

12. After a successful launch, the bidder will provide a one year renewable maintenance contract; which will cover call support, system troubleshooting and any required modifications.

Business Process Study

13. Successful bidder will undertake the required Business Process Studies to understand current process, suggest any changes to ensure successful transition to CRM system.

14. All system studies, as-is and to-be, should be documented and agreed with TRA's project manager and business users before system implementation and customization.

15. The successful bidder will provide functional requirements report based on the system study. The report should be agreed by TRA before implementation phase.

Service Module

Complaint Handling Features

16. Automatic creation of complaints by internal party, call center, external consumers and service providers.

17. Secure web interface for consumers to create and follow-up on their cases themselves (self-service portal).

18. Ability for consumers to update/re-open their cases through the self-service portal.

19. Ability to give more than one person from the call center company access to the self-service portal.

20. Ability to give call center company employees the permission to see only their own submitted cases or all the cases submitted by the consumer company employees.

21. Ability for business users to control the self-service portal security through the interface.

22. Ability for consumers to update their contact and company information through the self-service portal.

23. Synchronize the self-service portal with the CRM system.

24. Ability to create/edit/cancel/complete activities and link them to cases.

25. Ability to create a knowledge base.

26. Ability to create custom knowledge base article templates.

27. Ability to link cases to knowledge base articles.

28. Ability to search and email knowledge base articles both from the system and from the self-service portal.

29. Ability to restrict some knowledge base articles from appearing on the self-service portal.

30. Configurable workflow to automate the case review and handling process.
31. Workflows should be easily editable through the web interface in case for example a change on a business rule is needed.
32. Automatic assignment (enquiry or complaints) of cases.
33. Lookup and display related complaints documents and information.
34. Ability to create/Edit/Hold/Cancel/Renew/Copy SLA contracts.
35. Ability to define SLA levels and types (support bound within 2 dates, by number of cases or by number of hours).
36. Notify affected departments and personnel by the case logging and status.
37. Load product, service and service provider information in relation to the complaint.
38. Integrate with Microsoft Office to create form letter templates for various types of correspondence and assign multiple action items to accelerate resolution and Automatic PDF conversion.
39. Integration with external call center management system (CosmoCom) and sync the required data to feed the system.
40. Intuitive workflow display to show document status.
41. Assign documents to individuals, groups or roles.
42. Multiple routing options: Parallel, Sequential, etc.
43. Conditional routing options to accommodate complex business processes.
44. Automatically send reminder notifications to assigned users and escalate to their managers.
45. Additional product specific decision trees can easily be configured.
46. Regulatory reporting forms and reports based on user definable conditions.
47. Record initial assessment results of each stage and user.
48. Option to close appropriate case at any stage.
49. Help guide decision making.
50. Identify cases trends.
51. Ability to build ad-hoc searches and reports without development.

52. Ability to create/define new entities and their relationships among each other through the interface without development.

53. Link complaint to existing open investigation.

54. Link multiple complaints to a single investigation.

55. Generate and display values on different view including chart, live display.

56. Ability to set granular security permissions on CRM entities.

57. The CRM system should be based on a SOA architecture so that enable future integration with existing line of business applications through web services.

58. The CRM system should be integrated with Active Directory.

59. The CRM system interface should be based on a thin-client and users should not have to install any component on their machines in order to properly use it.

60. The successful bidder should conduct system study to understand the current processes and propose the work scope and implementation requirements.

61. High level design includes:
    - Solution description: complete description of components with architecture, technologies, and standards.
    - Diagrams: illustration of the main elements of the solution

62. The low level design should include detailed definitions of all the elements and low level presentations of the different architectures for the global perimeter of the solution. It shall include the list and specification of all hardware and software part of the solution.

Marketing Module

Marketing Module will mainly use for planning and managing campaigns / events. It should support the following:

63. Maintain a pool of TRA contacts, breaking it down to many smaller specified contact lists based on category, event, company …etc.

64. Plan and manage tasks and deliverables of campaigns and events.

65. Assign tasks to different personnel within TRA. Ability to define tasks for non-TRA members.

66. View tasks status, notify user before overdue time. Ability to escalate task on overdue.

67. Reports supporting – but not limited to:

    67.1. Tasks and deliverables status reports based on event, personnel …etc.

67.2. Event / campaign requirements check list.
67.3. Budget / expenditure reports based on campaigns with the possibility of breaking it down to sub-projects.

Press Monitoring Tool:

The objective of this tool is to monitor the news and advertisements related to TRA and the telecommunication sector. Archiving can be done in SharePoint 2010 which TRA has already invested in.

68. Ability to archive news by:
    68.1. News headlines: Title and ability to upload file(s) related to it
    68.2. Article details: Name of Publication, Page number, language, publication circulation, readership … etc.
    68.3. Type of news: Press release, article, letter, advertisement…etc.
    68.4. News classification: Positive or negative

69. Provide graphical reports on daily, weekly, monthly, yearly and specified period reports based on selected criteria.

Technical Requirements:

70. The system should be implemented in TRA main office.

71. Total number of users will be around 10 users, 7 internal users and 5 external users.

72. The bidders need to address implementation scenarios to ensure high availability, acceptable performance and minimum data lose in case of system failures.

73. The bidders need to specify servers / hardware requirements. TRA will agree with the successful bidder on the hardware requirements. TRA will be responsible of hardware purchasing and maintaining.

74. As the system will be integrated with the Call Center – external party – and consumer will be able to access it. Thus, the system should be implemented with a high security design to protect and safeguard the data and the system.

75. The successful bidder will provide a technical specification report based on functional requirements report.

76. The successful bidder will be responsible of installing and configuring the operating systems, databases and applications.

77. Technical documentations should be provided at each stage of the system implementation. A detailed technical documentation should be provided at go-live step which contain but not limited to:

    77.1. Systems design, architecture and connectivity
    77.2. Modules installed and their specifications
    77.3. Backup and restore procedures.
    77.4. Complete systems failure recovery.

Helpdesk & Support

78. A Single Point of Contact (SPOC) should be provided; it should be capable of handling all issues pertaining to the service. The support should available on 8*5 bases throughout the year.

79. The Bidders shall provide all details regarding the contact means of this central support (phone, web, fax, e-mail, ticketing, etc.)..

80. Escalation and resolution procedures shall be established to address any problems expediently.

In addition, the support team shall provide technical consultation / best practices on issues related to the operations. Good response time and resolution time shall be guaranteed by SLA.

5 Background

81. In order to gain a better understanding of TRA role, the Consultant should refer to the www.tra.org.bh for more information.

6 Deliverables, Expected Timeline and Project Management

82. Deliverables and expected timeline:

Item	Date
Deadline for submission of tenders	First page of this RFP
Opening Financial Proposals	30 March 2011
Vendor Selection and Contract Signing	21 April 2011
Kickoff Meeting	27 April
Detailed work plan*	2 May 2011
Functional Requirements Report*	8 May 2011
Technical Requirements Report*	10 May 2011
CRM go-live*	30 May 2011

*Successful bidder can suggest different time table according to project plan

83. The deliverables shall meet the requirements defined above in “Requirements” Section. The successful bidder shall produce the required deliverables to the satisfaction of the TRA Project manager. The deliverables will be considered completed once they are finally approved as such by the TRA Project manager.

84. The Consultant may propose additional activities and deliverables. Any additional activities and deliverables proposed:

- Should be clearly defined within the Bidder’s Technical Offer and identified separately within the Bidder’s Financial Offer;
- Will, subject to the agreement of TRA, be added as deliverables to the contract.

Project Management

85. A Project manager with overall responsibility and authority for this project will be nominated by TRA. The successful Bidder will coordinate all efforts, and communications, with the TRA Project manager.

86. The successful bidder will appoint a project coordinator/manager to be a liaison between the Consultant and the TRA Project manager for all issues related to the organisation of the project.

87. The successful bidder will commence the project with a kick-off meeting at TRA office. At this meeting the successful bidder will be expected to introduce and agree with the TRA Project manager the proposed organisation and methodology of the project and a proposed work plan (timetable).

88. The work plan will complete and presented to the TRA Project manager in MS Project 2007 format.

89. The successful bidder work plan will have to accommodate sufficient time – minimum of 3 business days – for TRA to comment on those documents.

90. All meetings are to be documented by the successful bidder and meetings minutes to be presented to the TRA Project manager for approval. Additional documentation supporting the solution provided by the successful bidder may be requested by the TRA Project Manager.

91. The successful bidder may also be requested to undertake related additional tasks as seen to be necessary by TRA. Additional tasks shall require authorisation from TRA prior to initiation.

92. The successful bidder will co-operate fully with TRA and other parties, as identified by TRA, in terms of planning, information exchange, documentation, meetings, communications or other related activities that the TRA Project manager considers necessary in order to fulfil the contract and the requirements of this RFP.

93. Any information provided to the public in relation to the project under this RFP will need to be approved by the TRA Project manager.

7 Instructions for Respondents

General

94. General information about TRA may be found on the TRA's web site at www.tra.org.bh.

95. Responses to this RFP should address all of the requirements and deliverables set out in this RFP. Responses shall provide a breakdown of the tasks involved for the completion of this project.

96. Responding consultants are requested to provide a summary of their relevant capabilities and past experiences in related issues as per Annex C: Bidders General Information.

97. Responding consultants shall provide CVs and contact details of all staff involved in the project. The CVs should be as per the CV format in Annex A: CV Template. Changes to any of the proposed staff members shall only be permissible with the consent of TRA. Any staff members replaced must be replaced by alternative staff members with at least equal standing to the original staff member.

98. Consultants may sub-contract elements of the work but shall assume contractual responsibilities for all work and co-ordination of any third parties. Any such sub-contracting must be clearly identified in the proposal.

99. Responding consultants must declare in their proposals that they have conducted all relevant conflict of interest checks and that to the best of their knowledge they face no conflict of interest in accepting the engagement if selected.

100. The selected Consultant will be required to enter into a formal contract with TRA, the terms of which will be supplied.

101. Until any such contract(s) have been executed, this RFP and any responses to it shall not in any way bind TRA.

102. Firms that submit a proposal in response to this RFP are solely responsible for meeting any and all costs incurred in preparing their proposal. No costs incurred by any consultant (successful or otherwise) in preparing and submitting a proposal shall be reimbursable by TRA.

103. Responding consultants may include supporting documents and attachments as Annexes to the proposal.

104. Proposals should be straightforward, succinct and demonstrate the capacity of the Consultant and the proposed solution to address the practical requirements of this work.

105. TRA may issue any clarification to all participants as an addendum to the RFP. Such an addendum will be published to the participant, communicated to the all participants and become part of the RFP documents.

Expected profile of and the requirements to the Consultant

106. The successful Bidder (and the specific staff members proposed to be assigned to this task) is expected to:

- Have a thorough knowledge of Microsoft technology, Proposed CRM Solution, and other relevant technical fields.

107. Responding bidders are expected to include non-confidential samples of work on similar projects (e.g. consultation documents, similar implementations, responses to a consultation document, etc).

108. The bidder, submitting the response to this RFP, shall satisfy the following criteria (pre-qualification requirements) and provide evidence thereof (including names of the clients and summaries of the projects):

1) The assigned consultants must be CRM Solution certified.

2) Key consultants assigned to this project must have implemented at least 3 CRM Solution. References should be provided.

3) The assigned lead consultant has undertaken at least 3 projects with similar nature of this project;

4) The assigned consultants should have at least 5 years of overall experience;

5) The consultants, assigned to this project, had at least implemented 2 successful similar nature projects.

6) Bidder must be experience in solutions other that CRM –e.g. ERP, Intranet - in order to facilitate any future integration requirements.

109. Proposals not meeting the pre-qualification requirements will not be evaluated.

Format and number of proposals

110. Bidders must submit 2 separate proposals:

- A technical proposal which be submitted in soft format (by CD or DVD) and one hard copy format. All files shall be compatible with Microsoft Office 2007/2010 suite.

- A financial proposal in **HARD FORMAT** in a separate sealed envelope.

111. The technical proposal should be submitted to address in Contact Information.

112. **The technical proposal must reach TRA by the closing date of this RFP.**

113. The technical proposal shall detail how the responding Consultant proposes to manage and complete this project.

114. The structure and content of the technical proposal will, at a minimum, include:

Structure and content of the technical proposal	
1	Covering letter from an authorised signing officer including a declaration that the Consultant satisfies the prequalification requirements
2	Executive overview (maximum 1 page)
3	Bidder Checklist (Annex D of the RFP)
4	An explanation of the understanding of the project, the issues involved and deliverables
5	Proposed Solution System. ▪ System broachers; ▪ Main and detailed features; ▪ System capabilities, expansion, functionality and integration; ▪ Compatibilities with Microsoft products e.g. Windows, Office, SharePoint, Exchange…etc ▪ Customization ability & flexibility;
6	Proposed work plan by task for the overall project including: ▪ working method, and project management; ▪ the main tasks and sub-tasks to be completed with associated timeframe and dates; ▪ deliverables to be submitted with associated completion dates; ▪ critical path
7	The Consultant may suggest additional activities and deliverables to those set out in the RFP, which are required to deliver this project (these activities and deliverables should be clearly identified as such)
8	Man-days resource allocation plan by tasks and individuals assigned (Annex B of the RFP)
9	Company overview, its qualifications and experience (Annex C of the RFP)
10	Table of summary CVs and full CV’s in the format set out in the relevant Annex of this RFP (Annex A of the RFP)
11	Samples of work on similar projects (e.g. consultation documents, solutions, responses to a consultation document etc.) and recommendations from clients for similar projects should be included if available
12	Two similar project reference, 5 other engagement references based on CRM Solution

115. The fixed price financial bid document must be submitted to TRA in a soft and hard copy in a separate sealed envelope. The separate envelope will be clearly marked "Financial bid in response to RFP – CRM System [INSERT NAME OF BIDDER]". **The financial bid document must reach TRA at the closing date of this RFP.**
The financial proposal shall include:
   - Software Price (If any)
   - Installation and testing price
   - Annual Maintenance fee, which will be applicable after the warranty period

116. Bidders shall ensure they complete and include in their technical proposal the Bidder's checklist of Annex D.

117. A tabulated format should be provided to show all costs in Bahraini Dinars (BD) in a form that can easily be reviewed and compared with other respondents' proposals. The structure and content for the financial bid shall include as a minimum, for each deliverable, task and proposed sub-task:

- The proposed team member to complete the task;
- An estimate of the number of man days to complete each task;
- An overall fee for each phase/activity/deliverable;

118. The financial proposal separately from the technical proposal should be delivered to (delivery can be made to either the street address or the P.O. Box) in the Contact Information.

RFP Closing Date

119. The closing date for receipt of proposals is set out in the front page of this RFP.

120. All proposals should be valid for acceptance for a period of at least 90 calendar days from the deadline for submitting responses.

Response Submission and Query Handling

121. It is the responsibility of the respondents to ensure that their responses to the RFP have reached TRA within the required timeframe.

122. Any queries regarding this RFP should be addressed to the Contact Information.

8 Invoicing

123. Invoicing shall be made after successful completion of each phase using the following invoicing profile:

Description	% of fixed price financial bid

Contract signing and kick-off meeting	10%
Completion of Design Phase	20%
Completion of Implementation Phase	20%
Completion of Testing and Training Phase	30%
Documentation and sign off	20%

9 Evaluation Process and Outcome

124. TRA will only evaluate proposals that meet the pre-qualification requirements (paragraph 108).

125. TRA will evaluate the proposals according to the criteria detailed below, producing a score of 100%:

- 10% - Understanding of the task required in relation to this RFP;
- 30% - easy-to-use, friendly to integrate and flexible to upgrade.
- 40% - Quality of the technical approach outlined in the proposal including the skills and experience of the personnel allocated to the project by the responding Consultant;
- 20% - Consultants profile and the related experience.

126. Proposals scoring less than 50% for any individual criterion will be eliminated from the process.

127. Proposals scoring less than 70% overall after the evaluation process will be eliminated from the process.

128. The contract will be awarded to the responding Consultant who submits the proposal offering the best value for money. This will be decided by dividing the technical score by the total price of the proposal.

129. TRA reserves the right, at its sole discretion, to accept any proposal it chooses in full or part, negotiate with any responding Consultant, and accept any alternative proposals. TRA is not bound to accept any proposal or appoint a Consultant.

Annex A: CV Template

CURRICULUM VITAE

1. **Proposed Role in Project:**
2. **Family Name:**
3. **First Names:**
4. **Date of Birth:**
5. **Nationality:**
6. **Education:**

Institution (Date from – Date to)	Degree(s) or Certificate(s) obtained:

7. **Language Skills:** Indicate competence on a scale of 1 to 5 (1–excellent; 5–basic)

Language	Reading	Speaking	Writing

8. **Membership of professional bodies:**
9. **Other skills:**
10. **Present position:**
11. **Years with current firm:**
12. **Key qualifications:** (Relevant to the project)
13. **Project experience:**

Country	Role	Date from – Date to	Project description / achievements

14. Professional Experience:

Date from – Date to	Company	Location	Position	Description

15. Other relevant information (e.g. Publications)

Annex B: Resource Allocation Plan Template

TASKS/DELIVERABLES	**(Project team member 1)**	**(Project team member 2)**	**(Project team member 3)**	**…**	**(Project team member x)**
Deliverable 1: Task Task Task					
Deliverable 1 sub total					
Deliverable 2: Task Task Task					
Deliverable 2 sub total					
Project Totals					

Annex C: Bidder's General Information

Bidder's Contact Details

1. The following information, in this format, is required for each proposal submitted:

    a) Name, address, email, telephone, and fax number of a Bidder;
    b) Contact person dealing with the proposal;
    c) Description of role, or element of contract, to be fulfilled by any member of this project;
    d) Identification of party who will carry overall responsibility for the contract (in case of consortiums);
    e) Confirmation of acceptance by the Bidder and any third parties of the terms and conditions of this RFP;
    f) Confirmation of acceptance by the respondent and any third parties regarding overall responsibility for successful delivery.

Bidder's Profile

2. The following information, in this format, is required by each Bidder (and a member of the bidding consortium) when submitting its proposal:

    a) Length of time in existence;
    b) Number of employees;
    c) Brief description of the company's principal areas of activity;
    d) Projects completed relevant to the RFP;
    e) Any additional information in support of this proposal.

Annex D: Bidder's Checklist

Bidder's Checklist

Please make sure that all items are marked completed before submitting the bid to TRA.

No	Item	Completed (Yes / No)
1	**Does the Bidder satisfy the pre-qualification requirements and has the supporting evidence been provided in the Technical Proposal (mark Yes/No for each one of the criteria):** -The assigned consultants must be CRM Solution certified -Key consultants assigned to this project must have implemented at least 3 CRM Solution. References should be provided. -- The assigned consultants should have at least 5 years of overall experience; - Vendor must be experience in solutions other that CRM –e.g. ERP, Intranet - in order to facilitate any future integration requirements.	
2	**Bidder's check list completed and signed by an authorised person**	
3	**Does the proposal include a declaration from the bidder indicating that it has conducted all relevant conflict of interest checks and that to the best of its knowledge it faces no conflict of interest in accepting the engagement if selected?**	
4	**Has the technical proposal addressed all the elements outlined in the table "Structure and content of the technical proposal"?**	
5	**If third parties are involved, have the following been provided:**	
5.1	Identification of specific tasks that a specific 3rd party will perform	
5.2	Relevant explanation of the 3rd party's capabilities	
5.3	CV's of all involved personnel from the 3rd parties in the format required	
5.4	A tabulated format showing the tasks and also showing the following details per task:	
5.4.1	The proposed team member to complete the task	
5.4.2	Man-days resource allocation plan by tasks and individuals assigned	
6	**If there are any supporting documents, have they been attached in the Annexes?**	
7	**Has a resource allocation plan been attached to the overall project plan?**	
8	**Has the Financial Proposal addressed the following:**	
8.1	All costs shown clearly in Bahraini Dinars	
8.2	An overall fee for each phase/activity/deliverable	
9	**Has the proposal been arranged in 2 separate submissions as below:**	
9.1	Technical Response (to be sent in soft (electronic and hardcopy format)	
9.2	Financial Response (in an envelope to be sent as a soft and hard	

	copy)	
10	**Was the proposal delivered before the deadline set in this RFP to address in Contact Information**	