

AZANIA BANK LIMITED
CONSOLIDATED CLARIFICATION RESPONSE - REQUEST FOR PROPOSAL
(RFP)
FOR
CALL CENTRE SYSTEM WITH
CUSTOMER RELATIONSHIP
MANAGEMENT (CRM) CAPABILITIES
FEBRUARY 2022
RFP NO. ABL/PROC/CC/RFP/02/2022

| CLARIFICATION REQUEST | BANK RESPONSES |
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| Call routing algorithm | The system should be flexible to offer multiple call algorithm setups in a configurable manner, the basic ones should be, available agent, skill based and customer priority with call hunting capabilities |
| Systems Infrastructure setup | The bank prefer on premise infrastructure setup, the cloud based infrastructure may be proposed as an alternate option for the bank to evaluate. The proposal should include the required computing resource sizing requirements for the system |
| Call recording storage time | The bank required a minimum of three month storage time with archiving capability. The storage size in bytes need to indicted per unit second of time. |
| Required type and number of languages in IVR | The IVR must offer a minimum of two languages for English and Swahili with scalability to add new languages in future. The system should be flexible to offer a number of menus in a configurable manner with no limitations with scalable and configurable number of menu option. |
| Backend system integration to IVR | The IVR should be integrated with the CRM system on request with this RFP. |
| Backend system integration to CRM | (a) Core banking system Flexcube (FCUBS) ver. 12.4 (not required in day one, but something required in the future enhancements for CTI requirements) (b) Reporting and Analytical tool: Oracle Business Intelligence (OBIP/OBIEE) – Required |
| Telephone connectivity | Should be able to handle SIP/PRI/E1/ and VOIP |
| Additional information in the Call handling capabilities and IVR | a) User count for the call center should capable of handling up to 20-50 calls routed to in charge with 30 CRM and media channels users. This is in line with what was described in the original requirement document. |

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| | <p>b) The average duration of the calls taken by the agents should be configurable with no limitations, same for the number of calls to be handled by the agents per day as per the needs.</p> <p>c) The self-service channels in the IVR should be be scalable and configurable as per the needs with no limitations. To start with the pre-recorded responses on the self-services requests</p> <p>d) Call back capability for abandoned or missed calls either manually or automated via a voice mail.</p> |
| The required self-services referred in the requirements and flows | IVR recorded responses in a systematic flows and Chabot that should include both the static and dynamic data in a configurable manner |
| The chat media channels referred in the requirements | The chatbot will be required in the day one of the system deployment. While Webchat, Facebook Messenger, WhatsApp for Business, twitter DM) shall be scoped in the future as part of the system up-scaling capability. |
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| <p>Clarifications on Contact management capabilities to allow customer segmentation for better tailoring of products and targeted marketing.</p> <ul style="list-style-type: none"> • Expected targeted marketing • The customer segmentation perspective • Departments to use the system | <p>a) The targeted marketing is referring to digital campaigns that should focus on product base and type of customers such as corporate/retails/diaspora etc.</p> <p>b) The customer segmentation is referring to the (a) above.</p> <p>c) The departments to use the system are Business Dept, Operations Dept and IT as a support unit.</p> |
| Information on required Reports and dashboards, inbuilt reports and dashboards ad well as capability to integrate with the | <p>a) Integration to BI is required as a mandatory.</p> <p>b) Integration to CBS is a required feature however not as a mandatory in day one of the system deployment, same need to be scoped in the next phases of the system enhancement.</p> |

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| <p>business Intelligence system of the core banking system.</p> <ul style="list-style-type: none"> • Integration to BI • Integration to CBS for CTI purpose | |
| <p>Information on Workflow automation capabilities</p> | <p>a) By workflow we refer to all processes that will be starting from the IVR, self-service channels, call center systems to CRM required to have an auto workflow (receiving stage, escalations level until feedback and closure).</p> <p>b) The details of the types of service requests will be provide during the project execution to the successful bidder, however should be from AGENT (Internal employees) and Bank customers (External inquiries)</p> |
| <p>Information on Case Management/Customer Satisfaction surveys</p> <ul style="list-style-type: none"> • Channels for the customer feedback needs | <p>Customer surveys to be able to cover various media channels like voice, email, voice mail, webchat, SMS etc.</p> <p>SMS is a mandatory as one of the media channel to interact with customer either using PUSH or notification triggered</p> |
| <p>CTI solution</p> | <p>The Bank currently have no CTI</p> |
| <p>Disaster Recovery requirements information</p> | <p>Disaster Recovery will be WARM Redundancy (periodic refreshing), this is requested from a capability point of view and not mandatory</p> |
| <p>Other clarifications</p> | |
| <p>Bank top challenges with customer journey</p> | <p>(a) Cross selling limitation as we have no 360 degree view of our customer support.</p> <p>(b) As per regulatory requirement on customer experience transparency</p> <p>(c) Absences of handling customer complaint management.</p> <p>(d) Absences of resolving customer issues on time as per Turn Around Time set.</p> <p>(e) Absence of measuring AGENT efficiency.</p> <p>(f) Hard to assesses and evaluate us on the customer experience through CSAT</p> <p>(g) Hard to achieve the customer centricity theme which is one of our pillars</p> <p>(h)</p> |
| <p>Typical steps in our sales process.</p> | <p>(a) Prospecting</p> <p>(b) Preparation.</p> |

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| | (c) Approach (d) Presentation (e) Handling objections (f) Closing (g) Follow-up. |
| Need for marketing solution | Not required in this RFP |
| Expected timeframe of the overall project | One month |
| Requirement to Publish any advertisement through Social Media Channel | Yes, the bank intend to public advertisements through social media |
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NOTE: With this Request for Proposal, there will be no extension of submission date.