

# APPENDIXES

## Example Request for Proposal (RFP): Chatbot Implementation

### 1. Introduction

Doerscircle is committed to enhancing customer engagement through technology. To support this mission, we aim to implement a chatbot solution to handle routine customer service and sales queries. The chatbot will improve customer satisfaction, streamline operations, and enable our team to focus on complex tasks requiring human attention.

### 2. Project Background

Currently, our customer service operations face challenges with high query volume, inconsistent responses, and limited availability outside business hours. Implementing a chatbot will address these issues by providing:

- 24/7 customer support.
- Consistent communication.
- Personalized engagement to boost conversions.

### 3. Scope of Work

- **Primary Functionality:**
  - Automate responses to FAQs.
  - Provide consistent messaging across platforms.
  - Recommend products or services to enhance engagement.
- **Integration Requirements:**
  - Operate seamlessly within the existing IT infrastructure.
  - Support live chat escalation to human agents.
- **Analytics & Reporting:**
  - Provide insights into interaction performance, query resolution rates, and customer satisfaction.

### 4. Functional Requirements

This section outlines the specific functional capabilities the chatbot must deliver.

#### 4.1. General Functionality

- **Automated Query Handling:** Address common inquiries such as account setup, product guidance, and order status.
- **Interactive Responses:** Deliver engaging, relevant responses to improve the customer experience.
- **Product Recommendations:** Offer tailored product or service suggestions using predefined criteria.

## 4.2. Integration Features

- **Live Chat Escalation:** Facilitate smooth handover to human agents for unresolved issues.
- **CRM System Integration:** Log interactions and insights into CRM systems (e.g., Salesforce or equivalent).

## 4.3. Reporting and Analytics

- **Performance Dashboards:** Summarize key metrics such as response times and customer satisfaction.
- **User Feedback Collection:** Gather feedback to refine chatbot responses continuously.

# 5. Non-Functional Requirements

These requirements describe qualities and constraints for the chatbot's performance, usability, and reliability.

## 5.1. Performance

- **Response Time:** Respond to user queries within 5 seconds under normal load.
- **Concurrency:** Handle at least 1,000 simultaneous conversations without lag.

## 5.2. Usability

- **Language Support:** Support English and one additional language relevant to our market (e.g., Mandarin or Malay).
- **Accessibility:** Comply with WCAG 2.1 standards for universal accessibility.

## 5.3. Security

- **Data Encryption:** Ensure data in transit and at rest is encrypted using TLS 1.3 and AES-256.
- **Privacy Compliance:** Adhere to GDPR and other applicable data protection regulations.

## 5.4. Reliability

- **Uptime:** Maintain a 99.5% uptime SLA with fallback mechanisms for failures.
- **Disaster Recovery:** Implement recovery processes to restore functionality within 2 hours.

## 5.5. Scalability

- **Growth Accommodation:** Support increased user volume and additional channels, such as WhatsApp or Facebook Messenger.

# 6. Success Metrics

To measure the chatbot's success, the following KPIs will be tracked:

- **Customer Satisfaction Score (CSAT):** Target 80% or higher.

- **Average Response Time:** Less than 5 seconds.
- **First-Contact Resolution Rate:** 60-70%.
- **Query Resolution Rate:** 70-80%.
- **Escalation Rate:** Below 30%.

## 7. Budget

- **Basic Implementation:** \$1,000 - \$10,000, suitable for simple setups and pre-built templates.
- **Advanced Implementation:** \$10,000+, for more sophisticated solutions with integrations and multi-channel support.

## 8. Project Timeline

- **Submission Deadline:** [Insert Date]
- **Vendor Selection:** [Insert Date]
- **Implementation Start:** [Insert Date]
- **Go-Live Date:** [Insert Date]

## 9. Proposal Submission Guidelines

- **Format:** Submit a detailed proposal including your approach, pricing, timeline, and relevant case studies.
- **Contact Person:** [Insert Name and Contact Information]
- **Submission Email:** [Insert Email Address]

## 10. Evaluation Criteria

Vendors will be evaluated based on:

- Experience with similar projects.
- Pricing and value for money.
- Ease of integration and scalability.
- Customer references and reviews.

## 11. Appendices

- **Use Case Description:** Detailed document outlining the purpose and benefits of the chatbot.
- **FAQs:** Answers to common questions about the RFP process.