

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.