| **DOCUMENT TYPE** | **PROJECT PROPOSAL** |
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| **PROJECT** | **DEVELOPMENT OF CUSTOMER RELATIONSHIP MANAGEMENT (CRM) FOR CWC MAKABATA HELPLINE 1383** |
| **BUDGETARY REQUIREMENT & SOURCE** | **P4,000,000 - CO CI-LFP** |
| **TIMELINE** | **JULY - DECEMBER 2024** |
| **DIVISION RESPONSIBLE** | **PROJECT MANAGEMENT OFFICE (PMO)** |

1. **BACKGROUND/RATIONALE**

The Council for the Welfare of Children (CWC) is the focal inter-agency body of the Philippine Government for children, responsible for coordinating the implementation and enforcement of all laws related to children's welfare. In line with this mandate, the CWC aims to provide accessible child helpline services nationwide to strengthen its commitment to serving and protecting children in situations of armed conflict (CSAC) and those experiencing other protection issues such as abuse, neglect, exploitation, or discrimination.

To fulfill this goal, the CWC initiated the development of a Helpline as a pilot project. The Helpline aims to establish protocols and utilize technology for immediate coordination, referral, and monitoring of cases involving children in need of intervention or support. It also envisions connecting and coordinating with existing helpline services for children and their parents, enabling preventive interventions.

The MAKABATA Helpline 1383, operated by the CWC, serves as a lifeline for children, providing child protection, emergency assistance, counseling, referral services, and public awareness on child protection issues. It also collects data on child protection cases for research and policy development.

The MAKABATA Helpline 1383 encountered significant challenges with the packaged CRM system integrated into the Procured Cloud Contact Center as a Service Solution in 2023. These challenges included limited customization options, which hindered the flexibility of the system, and misalignment with the protocols and processes of the MAKABATA Helpline 1383, leading to inefficiencies in workflow. Additionally, integration and data transfer delays between the CRM System and the telephony system caused issues with real-time information availability.

In response to these challenges, PMO has decided to develop a custom CRM/Ticketing system specifically tailored to the needs of the MAKABATA Helpline 1383. This bespoke solution will offer greater flexibility and address the shortcomings of the previous CRM System. Moreover, having an in-house system will prove to be more cost-effective in the long term, as the PMO possesses its own IT staff to manage the system. By integrating a ticketing and admin dashboard with the telephony system, the CWC can ensure uninterrupted helpline operations and enhance the overall user experience for both children and helpline staff.

This project proposal aligns with the CWC's mandate to protect and promote the welfare of children, as well as the provisions of Republic Act 11188, which emphasizes special protection for children in situations of armed conflict. By investing in a robust and integrated contact center solution, the CWC can effectively serve and protect children, ensuring their rights and well-being are upheld.

1. **PROJECT DESCRIPTION**

The MAKABATA Helpline 1383, operated by CWC, provides psycho-social services and interventions to child victims of child rights violations in the Philippines. This project aims to procure and expand the existing contact center system to transform customer service and support, making it more convenient and efficient for both customers and helpline officers.

To enhance the efficiency and effectiveness of the helpline, the project will focus on these areas:

1. Implement a ticketing system within the CRM to track and manage cases more effectively.
2. Helpline officers will be able to create and manage cases for each child victim, logging and tracking progress on a centralized platform.
3. The ticketing system will enable case assignment to team members and monitoring of ongoing interventions.
4. This comprehensive approach ensures no case is overlooked or delayed, and necessary actions are taken promptly.

By implementing these new systems within the CRM, the MAKABATA Helpline 1383 will significantly improve its efficiency and effectiveness. The goal is to provide a more convenient and efficient service, ensuring child victims of child rights violations receive the necessary assistance and interventions in a timely manner.

1. **OBJECTIVES**

The main objectives of this project are as follows:

1. Procure a reliable and user-friendly CRM for the MAKABATA Helpline 1383.
2. Improve the user experience for helpline staff through the development of a CRM that is integrated with the telephony system.
3. Enable the helpline operators to effectively manage and track reports, ensuring accurate and timely assistance to children in need.
4. Facilitate the easy generation of reports and provision of data analytics to stakeholders and the organization.
5. **SCOPE**

The scope of the project entails the procurement and implementation of a CRM System/Ticketing System with an Administrator Dashboard, specifically tailored to meet the needs of the MAKABATA Helpline 1383.

The CRM System will integrate essential features such as Case Management, Communication Integration, Reporting and Analytics, and Knowledge Base. These functionalities will ensure efficient handling of incoming calls from child victims and concerned individuals, thereby reducing wait times and enhancing the overall call experience. Moreover, the system will streamline helpline operations by empowering helpline operators to create and manage cases, assign tasks, and monitor case progress. Additionally, the Administrator Dashboard will serve as a centralized hub for helpline administrators to monitor operations, generate reports, and derive insights from data for ongoing enhancement.

Recognizing the diverse communication preferences of users, the system will offer omni-channel support. This means that the helpline will be equipped to receive and respond to inquiries through various channels, including phone calls, emails, and social media platforms. Integration with social media platforms will enable the helpline to effectively monitor and respond to messages and comments received, thereby ensuring a comprehensive and timely support system.

1. **TIMELINE**

The project is estimated to be completed within a timeframe of 6 months, starting from the date of contract award. This timeline encompasses several key stages, including the procurement process, development of the system, data gathering, system installation, configuration, testing, training, and integration with social media platforms.

| **NO** | **TASKS/ACTIVITIES** | **MONTH** | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **JUL** | **AUG** | **SEP** | **OCT** | **NOV** | **DEC** |
| 1 | Business Analysis |  |  |  |  |  |  |
| 2 | Data Gathering |  |  |  |  |  |  |
| 3 | Planning |  |  |  |  |  |  |
| 4 | Development |  |  |  |  |  |  |
| 4.1 | Customized Dashboard |  |  |  |  |  |  |
| 4.2 | Account Management |  |  |  |  |  |  |
| 4.3 | Reports and Analytics |  |  |  |  |  |  |
| 4.4 | Integration with Communication Channel |  |  |  |  |  |  |
| 4.5 | Customization and configurations |  |  |  |  |  |  |
| 5 | Data Migration |  |  |  |  |  |  |
| 6 | Infrastructure setup and deployment and configuration |  |  |  |  |  |  |
| 8 | Testing |  |  |  |  |  |  |
| 9 | End-user Training |  |  |  |  |  |  |
| 10 | Functional System |  |  |  |  |  |  |

**III. Project Duration**

The development of the CRM System Project will commence on July 15, 2024, or upon receipt of the Notice to Proceed. Delivery is anticipated on or before December 31, 2024.

**IV. SPECIFICATIONS**

The development of CRM will lead to the following:

CRM (Customer Relationship Management):

1. User Registration and Authentication:
   1. Allow users to register and create accounts.
   2. Provide secure authentication methods (e.g., username/password, two-factor authentication).
2. Contact Management:
   1. Store and manage client contact information.
   2. Track interactions and communication history with clients.
   3. Categorize and segment clients based on their attributes and behavior.
3. Ticketing:
   1. Allow users to create tickets for inquiries or issues.
   2. Assign tickets to appropriate agents or teams.
   3. Track ticket status and resolution.
4. Reporting and Analytics:
   1. Generate reports
   2. Provide analytics on clients status
   3. Visualize data through charts and graphs for easy interpretation.
5. Integration with Communication Channels:
   1. Integrate with various communication channels such as email, phone, and social media.
   2. Capture and track customer interactions from different channels.
6. Customization and Configuration:
   1. Allow administrators to customize system settings and workflows.
   2. Enable user-defined fields and data structures.
   3. Provide options for integrating with other systems or applications.
7. Security and Data Privacy:
   1. Ensure data security and privacy measures.
   2. Comply with relevant data protection regulations.
8. Cloud-Based Solution:
   1. The CRM System should be cloud-based
   2. The service provider will be responsible for managing the system infrastructure and ensuring its availability.

Note: The complete **Terms of Reference** is herein attached as **“Annex 1”.**

**VI. PROPOSED BUDGET**

The proposed budget for the development of CRM for the MAKABATA Helpline 1383 is **Php 4,000,000**. This budget considers the market costs for developing a robust ticketing system that includes features such as user registration and authentication, ticket creation and management, ticket assignment and escalation, a knowledge base, reporting and analytics, and an admin dashboard for efficient system management.

In addition to the development costs, the procurement of the CRM also includes cloud hosting to host the system, provide domain name (or setup with the current domain of CWC - cwc.gov.ph), and SSL certificate. This hosting and domain setup will be valid for 6 months or until December 31, 2024.

The matrix below will determine the budget parameters for each expense item, totaling **Php 4,000,000.00** or **Four Million Pesos only**. Please note that a separate Purchase Request Form will be prepared and submitted.

| **EXPENSE ITEM** | **AMOUNT** | **FUND SOURCE** |
| --- | --- | --- |
| Customer Relationship Management System with Cloud Hosting for 6 months | P4,000,000.00 | 2024 CI-LFP |
| **TOTAL** | **P4,000,000.00** |  |

**VII. RECOMMENDATION**

The Project Management Team encountered several problems with the packaged CRM System integrated into the Procured Cloud Contact Center as a Service Solution in 2023. These problems included:

1. Limited customization: The CRM System did not allow users to modify the interface and processes according to their needs, restricting the flexibility of the system.
2. Misalignment with protocols: Instead of the system following the protocols and processes of the Makabata Helpline, the helpline had to adjust to the limitations of the system, resulting in inefficiencies and a deviation from the desired workflow.
3. Integration and data transfer delays: The CRM System had incomplete integration with the telephony system, causing delays in transferring and updating data between the two systems and affecting real-time information availability.
4. Lack of user-friendliness: The CRM System was not user-friendly, making it difficult for helpline officers to navigate and utilize its features effectively.
5. Limited reporting customization: The reporting functionality of the CRM System did not meet the expectations and needs of the Makabata Helpline, lacking the necessary customization options for tailored reports.

Considering these issues, the Project Management Office (PMO) has decided to develop a CRM/Ticketing system specifically tailored to the needs of the Makabata Helpline. This custom system will provide greater flexibility and address the shortcomings of the previous CRM System. Additionally, having their own system will be more cost-effective in the long run, as the PMO has its own IT staff to manage security, maintenance, and availability.

**VIII. IMPLEMENTATION ARRANGEMENT**

The Head of PMO, shall be responsible for monitoring the progress from the system development to implementation and shall be responsible for evaluation of the system providers and to monitor the implementation of the progress. Also ensuring that the project is executed within expected timeframe, budget, and quality.

The Information Technology Officer I, will oversee the development and implementation of the project and ensure that all project activities are conducted in accordance with established standards, procedures, and guidelines. He/She will be defining how the system should be built, operational, and used to meet the quality standard of the system with proper documentation. Quality assurance testing to ensure that the project is meeting all functional and technical requirements.

The Computer Programmer III is responsible for identifying the role of each user in the system. This involves understanding the needs of the users and designing the system to meet those needs. The programmer will work closely with system providers and other team members to ensure that the system is designed to be user-friendly and meets the needs of all users.

The Unit Head of Management Information System Unit is responsible for ensuring that the system being procured and developed aligns with the agency's ICT requirements. Moreover, he/she is responsible for overseeing the project to ensure alignment with the organization's budgetary constraints and successful goal attainment. Effectively managing project resources and tracking progress against established objectives are also among his/her key responsibilities. Additionally, the MISU Head is charged with establishing a quality system to guarantee the proper functionality of the MAKABATA Helpline 1383 CRM System. This may entail implementing quality control measures and conducting thorough quality assurance activities.

**Contact Persons:**

**I. ATTY. KAREN GINA T. DUPRA**

Project Development Officer IV

MAKABATA Helpline 1383

Project Management Office (PMO)

Email: ktdupra@cwc.gov.ph

**II. MR. JONATHAN JAMES L. ENDOMA**

Information Technology Officer I

MAKABATA Helpline 1383

Project Management Office (PMO)

Email: jendoma@cwc.gov.ph

**III. MR. ROMER ANTHONY A. LARIBA**

Unit Head

Management Information System Unit (MISU)

Email:misu@cwc.gov.ph

**IX. DELIVERY SITE**

MAKABATA Helpline Office, 3rd Floor CWC Office, Quezon City

Council for the Welfare of Children

#10 Apo St. Sta. Mesa Heights, Brgy. Teresita

Quezon City, Philippines

**X. PAYMENT TERMS**

All payments shall be made in accordance with applicable laws and regulations, and shall be properly documented and recorded in the financial records of the organization. The matrix below shall determine the budget parameters of each tranche amounting to a total of **P4,000,000.00 or Four Million Pesos** only. A separate Purchase Request Form shall be prepared and submitted.

| **PAYMENT** | **DELIVERABLES** | **MOV** | **AMOUNT** |
| --- | --- | --- | --- |
| 1st Tranche | Upon signing of contract and payment of performance bond, submission of detailed project plan, including work breakdown structure, timeline, and resource allocation | Signed contract and proof of performance bond payment.  Work breakdown structure  Timeline  Resource allocation | 800,000  (20%) |
| 2nd Tranche | Prototype System with Basic Functionality  Completion of pilot testing phase with documented results, successful User Acceptance Testing (UAT) sign-off by CWC, and submission of final system documentation | Presentation of prototype system with basic functionality  Documented pilot testing results and UAT sign-off. | 1,800,000  (45%) |
| 3rd Tranche | Incorporation of feedback from pilot testing and UAT.  End-user Training | Revised system documentation or a report detailing the feedback implementation process.  Training Manual and Certificates | 600,000  (15%) |
| Last Payment | Delivery of fully functional system, final system acceptance by CWC, and handover of all system documentation and training materials | Final system acceptance by CWC and provision of system documentation and training materials. | 800,000  (20%) |
| **GRAND TOTAL** | | **4,000,000.00** | |

| **CERTIFICATE OF AVAILABILITY OF FUNDS**  **Charged to CI-LFP P4,000,000.00**  **HAYDEE D. TORRALBA** Administrative Officer V (Budget Officer III)  Administrative and Finance Division  Date:  Fund Source (Please check):  \_\_\_\_ 101  \_\_\_\_ 151  \_\_\_\_ 184  \_\_\_\_ Others (specify): |
| --- |

| Prepared by:  **JONATHAN JAMES L. ENDOMA**  Information Technology Officer I  MAKABATA Helpline 1383  Project Management Office | Noted by:  **ATTY. KAREN GINA T. DUPRA**  Project Development Officer IV  MAKABATA Helpline 1383  Project Management Office |
| --- | --- |
| Recommending Approval:  **MA. ERLINDA N. AGUILA**  Planning Officer III  MAKABATA Helpline 1383  Project Management Office | |
| Approved by:  **USEC. ANGELO M. TAPALES**  Executive Director V  Council for the Welfare of Children | |