Intelligra SOLUTIONS LIMITED

Terms of Reference for a Contact Center

1.   Introduction

1.1.   Background of Contact Center

Intelligra's innovative platform is the pioneer smartphone financing solution in Africa that integrates device OEMs, financiers and mobile network operators seamlessly towards enabling undeserved population in Africa in gaining access to affordable smartphones.

1.2.   What we are looking for

We are seeking a Contact Center Establishment Consultant with significant experience delivering and / or supporting others to deliver state of the art not for profit Contact Centers in Tanzania. Specifically, the partner will provide technical guidance and leadership on this exercise.

This client Contact Center comprises of an Integrated call Redressed System providing a single platform for staff at Intelligra to log, monitor and escalate the respective outbound /inbound calls. It will converge versatile mode of communication like Mobile, SMS to track, and resolve client requests and communications. It helps in collating client's thoughts and channelizing their problem solving.

This Contact Center, being operated from the Intelligra's premises, will receive calls between 8: 00 AM to 07:00PM for customer engagement, service and support and translates the calls into the computer. The built- in intelligent system ensures that the calls are disposed by the use of ICT which automatically tracks and pursues the status of calls with the action taking authority. To dispose a particular complaint, only the concerned official can update the database either through return SMS, email or from the web portal. If no action is initiated by the concerned official, the ICT tool automatically escalates the complaint to the higher action taking authorities. It also has built in MIS for administrators to identify the performance of their Contact Center unit section and officers there in for taking preventive actions.

1.3.   Requirement

Intelligra is seeking a proposal to set-up and train end to end facilities of a Contact Center. The requirement entails for handling calls through EPABX system, Head Phones, IVRS and CRM Software with call recording facilities to be integrated to FinanceOne for lead generation and support tracking.

2.   Scope of Work

The System Integrator (SI) /Vendor is expected to provide the following services under the scope of work for Setting-up, training and support for Contact Center for a period of a year, same will be based on the performance.

The proposed Contact Center shall be operated through an extensive open workspace for Intelligra's Contact Center staff/volunteers, with work stations that include a computer for each agent, a telephone set/headset connected to a telecom switch, and one station supervisor. It will be independently operated or networked with additional centers, linked to a corporate computer network and LANs. Intelligra will provide the adequate room space, furniture, network, internet & electricity, where the Contact Center will be set up.

The scope of work for Vendor under this RFP is broadly defined below. The Vendor is required to deliver the following services;

a) Understand the current business processes and functions pertaining to the business that will need to be translated in system setup.
b) Complete setup of Contact Center and design, size, deploy, train and support Intelligra staff with the Contact Center solution in an area included in the scope.
c) The implementation will consist of implementing the proposed Contact Center as per the requirements of Intelligra
d) Network architecture at proposed Contact Center should be devised and implemented considering Intelligra guidelines & its clients' convenience.
e) Integration of IVRS.
f) Support & Maintenance of the overall system solution for one year.

g) The Vendor must provide infrastructure that is vertically and horizontally scalable beyond the initial requirement of 6 seats.

2.1. Operational Scope

The operational scope is detailed out below:

a) Contact Center to be setup at Intelligra will follow the per-seat model.
b) Initially, the Contact Center will be operational throughout the window of operations. The operating window for Contact Center shall be from 08 AM to 7PM, 7days a week (Intelligra working hours) and the vendor should setup in the system agents (Intelligra staff) to be available as requested during operations.
c) Contact Center shall be operational on National holidays / Weekends.
d) If the requirement arises, Intelligra shall increase or decrease of the number of seats for the agents.
e) Increase / Decrease of agents (Intelligra staff) will be done at Intelligra as per the following:
   ○ Temporary increase (or increase during peak hours) shall mean increase for a limited period. It could be for a few months. It could also mean increase during peak hours in a day for any number of days.
   ○ In case Intelligra wishes to reduce/increase the number of agents, a review will be done.
   ○ Proper orientation should be done to ensure any incoming agent (Intelligra staff) is appropriately trained to take over the role.
   ○ VENDOR will provide detailed operational manual and standard operational procedures for all agents. The Vendor and Intelligra will review some parts of the manual to allow easy use to be setup in the system in place.

2.2. Client call number/ toll free number

(a) Intelligra will provide client call number/ toll free number for operation of Contact Center.
(b) The fees paid for the acquisition of the toll free/client number and applicable rentals shall be paid on actuals by Intelligra.
(c) The tariff and the rental charges (toll free number and the telephone lines) negotiated with the Telecom Service Providers will be handled by Intelligra
(d) The Vendor shall take the suggestion from Intelligra before completion of setup with agreed Telecom Service Providers and actual requirements
(e) The toll free/client number shall be used for outgoing calls to clients, for follow-ups, quality feedback, etc.

2.3. Contact Center Service

While Vendor sets up system, the intention of this contact center should offer following service categories: -

(a) Generate new sales and revenue
(b) Boost customer satisfaction
(c) Referrals
(d) Monitoring & Evaluations
(e) Connect all channel (Social media, App, Text massage)
(f) Information Services
(g) Enquiry Services
(h) Request Services
(i) Periodic interaction

Intelligra may add additional related or similar services to this list. Vendor will provide draft formal process manuals and call flow to handle all above requests

2.4. Process Delivery

Interfacing requirements to be assessed based on the service requirements of Intelligra. Intelligra

expects the service provider (agent/Intelligra staff) to ensure an end-to-end process delivery by entering caller details in the Contact Center solution, generating a ticket number for each unique query which can be provided to the respective Doctor in charge or associated person as a link to pursue the query and bring it to its conclusion. The Vendor or System Integrator will make the above process possible during the setup.

Intelligra expects that queries generated by the front end are pooled at the end of day to each relevant back-end sections of personnel/units (quality, projects/device services) who resolve them and update the back end in order that the Contact Center agents accessing the front end are aware of the query resolution.

2.5. Integration of Software

As part of the establishment of the Contact Center, the Vendor will customize and integrate the requirements of Intelligra. These applications will include:

(a) Automatic Call Distribution
(b) Customer Relationship Management Application
(c) Computer Telephony Integration
(d) Recording Solution
(e) Web based call analytics application tool that may be provided.
(f) Integration with our core system

The Vendor shall be responsible for customizing the solution and integrate the IVRS as per the need. The system should have following features after the integration.

(a) Concurrent calls handling (60 +)
(b) Call will be automatically routed to the free Contact Center supervisor.
(c) If all the CCS are busy, voice message will be played till the operator is free.
(d) Voice logging will be the part of the system.
(e) Call bridging/conference
(f) CLI will be displayed on the Screen.
(g) Caller history can be available from CRM
(h) Easy reporting facilities
(i) GUI based configuration interface
(j) Dashboard for real-time visibility, tracking and analytics
(k) Scalable
(l) All call logger reports should be available on the Contact Center portal (as well as website) for officers and public view depending upon the access right.

2.6. Feature of PBX Gateway

The Gateway should have the facility of accepting PRI connection, more than 20 extensions as per the below mentioned features.

a) ACD (Auto call Distribution)
   The ACD Key Features includes ANI/ DNIS based routing, managing multiple Queues, Welcome greeting message, Hold-on Music (User Defined), Office hours configuration, Compliant with standard PBX, Media Gateways & Phones, Different user defined reports, Web access facilitating remote agent login, Skill-based Call Routing, Wait time notification and integration with calendar & Voice logger. Also have the ACD Queues facilities.

b) IVR (Level-3 Voice Messaging)
   Level-3 IVR should have Self-help service with Text to Speech and Automatic Speech Recognition, IVR Node Flow Designer with Scripting Capabilities, Multi-language Support, Email/SMS/Fax Integration, Customizable IVR prompts and Agent Greetings facility.

c) Contact Center Communicator
   The CCC should be GUI based. It includes Instant Messaging Client, Operator Panel, Conference Administration, pop-up agent workbench screen, Unified Customer Interface for call handling, Call

disposition, Conferencing, N-way Call Transfer and Missed Call Alerts
Real Time Agent Monitoring The Solution should be provided with facility of Barging, Listening and monitoring the calls.

d) Voice Logger

There should be provision of Pre-integrated Active Voice Logging, 100% Blind Recording, Multi-format Voice Recording, Automatic Compression and Archiving and Web-based Remote Access to Voice Logs. Facility for quick and easy retrieval of Voice file according to the calls made.

e) Reporting Application

It should have the provision of Generation of business-oriented comprehensive reports at Agent, Campaign, System and Resource levels, Real-time and Historical Data Analysis and Automatic Maintenance and Backup Management

f) Supervisor Application

There must be the facility of Supervision architecture on telephony, agent, dialer and lead performance, independent supervisor interfaces for Inbound & Outbound campaigns and Complete MIS management for device, voice log, services and systems.

g) Voice Recording & Storage

There should be the facility of taking backup of System, Agent, Queue, and Instant automatically with time interval. Graphical interface to maintain the storage location. Intelligra will maintain the voice recording library as setup by the vendor. Incoming call recording facility to be implemented for further evaluation of complaints.

h) CRM Module

CRM integration with IVR & ACD should be facilitated to enable client profiling, Integration with any third-party database, CRM or tool for smooth and seamless functioning and having Web-Agent facility.

i) Head Phones for CCS

The Service provider will be facilitated with the Head Phones with advance features for the CCS. It should have the facility of Own Dial Pad, Volume Control, Flash Button, Tone/pulse dialling switch, Last Number Redial Button, Mute Button, Over-The-Head Noise-Cancelling Headset, Clear Sound quality, Extension Jack.

j) Contact Center Statistics

The Proposed Solution can able to give Queues/Agents statistics and real time status, Inbound/Outbound Graphs, CSV and PDF Data Export and Windows, Mac, and Linux Desktop Applications support.

k) Report Generation

Suitable reporting software should be available in the PABX system, as part of the above-mentioned applications, to generate standard report formats for monitoring the performance of agents, IVRS, ACD etc. the Vendor setup portal for sharing reports so that the designated officers of Intelligra are able to generate reports at Intelligra the key characteristics of the reports shall include:

- The reports should be in flexible report formats, in excel, txt or any other user-friendly structure including graphics depending on the request by Intelligra from time to time.
- Reports should also be available in web-enabled format & should be configurable to be mailed to a defined mailing list at defined interval/ period.

2.7. Operations & Management Phase

a) Content Management

Content creation and management is the backbone of any Contact Center. The Vendor will advise /work together with Intelligra staff as when called for on any created and validated scripts from the data for the purposes of facilitating the same to its agents (Intelligra staff). These scripts shall be considered for real-time client interaction usage only after approval from respective HOD. Content Management shall entail the following activities on the part of Intelligra /Vendor works.

- Content Creation: Content creation refers to the conversion and transformation of the identified information and data in pre-defined formats. Once the data transfer is completed from the Directors end, this data shall be processed at Contact Center level for conversion in pre-defined formats, usually in script form, which shall be utilized by Agents during service

delivery to clients. During data processing, it shall be ensured by Intelligra that sanctity of data is maintained and no change in data content is done.

- Content Update & Modification: Intelligra must ensure periodic update of content. Any update intimated by the HOD or Lead must be incorporated within 2 days of such intimation. Intelligra must also ensure preparation of FAQs on the basis of frequent service requests experienced at Contact Center. The same shall be incorporated in the content every 15 days.
- Content Validation: Intelligra must ensure validation and formal vetting of scripts (including FAQs) generated and updated on the basis of content received from the Lead/Director /Supervisor before its use for real-time client interaction. The manner and frequency of validation shall be decided during discussions between Intelligra staff. SI shall submit the script / content related to the services to the department by taking formal approval either through email / written communication.

b) Call Management

Contact Center will be accessible by the clients on the designated number and email address. The calls initiated from any phone number/ operator to the designated number shall land in the Contact Center of Intelligra. Intelligra will be required to prepare the Standard Operating Procedures (SOP) for various call types received through various channels and for each service to be delivered from the Contact Center. The list of standard operating procedures to be prepared includes, but not limited to, the following:

- SOP for handling Voice, SMS &Email channels for both information
- SOP for call closure including follow-up with respective
- SOP, scripts and escalation matrix for each service to delivered through Contact Center

c) System Maintenance

The Vendor shall be responsible for Contact Center solution setup and infrastructure support maintenance during the maintenance phase which shall include;

- Annual Technical Support Services including application patch, updates and deployment
- Application Customization (including IVR Tree expansion)
- Annual Maintenance of IT Infrastructure and support systems (relating to Contact Center)
- Helpdesk Management
- Preventive Maintenance Services
- Corrective Maintenance Services
- Configuration Maintenance Services
- Network Management Services
- Vendor Management Services

d) Monitoring

- After setup of the system a facility will be available for Intelligra monitoring team, external & internal auditors to be inspecting the functioning of Contact Center.
- Additionally, the system should have remotely monitor performance on all SLAs/KPIs and also of all the applications provided by the system i.e. real- time ACD statistics, calls in queue, number of agents logged in, number of agents abandoned answered calls, query of the call logs of a particular customer etc. by designated Contact Center Coordinator or Contact Center in-charge.

e) Go-Live

Go-Live refers the commissioning of the Contact Center and shall be accomplished when all Activities including:

- Training of Contact Center Agents, IT personnel and Manager.
- Preparation and validation of content and scripts for all services of Intelligra.
- Setting up (Installation, Testing & Commissioning) of hardware & software infrastructure

f) Technical Infrastructure

The Vendor will install all procured equipment as per stated technical specifications and as per scope of work. The key features of this setup shall be:

- Vendor will suggest and price all the necessary IT hardware like the digital PABX/Telephone, IP Desk Phones Networking etc. required for the solution as will be in the tender. Intelligra will decide to use the vendor or procure these at its own discreation.
- Appropriate manpower should be made available for the configuration and maintenance of the CRM/IVR/CTI/Recording Solution during the setup phase.
- Vendor shall provide the backup and recovery, vendor management for the hardware maintenance, OS configuration, patch management for the OS and database in consultation with IT Department. This is dependent on the decision done for item "a" above.

2.8. Constituents of Contact Center

The selected bidder will provide a team of highly competent professionals to setup system as per the requirement & qualification stated above.

2.9. Intelligra Responsibilities

a) Provision of required room space & electricity for the Contact Center Operation at Intelligra premises. Intelligra shall ensure that space should be adequate for the seating of each Intelligra agent.
b) Provision of Toll-Free Number
c) Facilitating the entire process by making quick decisions
d) Resolving escalated issues in time
e) (f) Participation in status review meeting (on need basis)

2.10. Project Timeline

The vendor will be required to provide a timeline for supply, setup of digital PBX and its accessories, training and commissioning that should not exceed 3 weeks.