

## TERMS OF REFERENCE

### 1. PROJECT TITLE

Procurement of One (1) - Year Subscription for a Client Relationship Management (CRM) System for the National Registry of Scripless Securities (NRoSS)

### 2. DESCRIPTION

The project aims to provide the various Divisions under the Liability Management Service (LMS) and Management Information Systems Service (MISS) with a Client Relationship Management System that shall primarily serve as a portal where NRoSS Participants can raise a ticket to report issues, concerns and queries. The system shall enable BTr to promptly address the issues, concerns and queries, monitor the progress of each ticket, perform analysis of data logged in the system and provide feedback facility that serves as a measure of the satisfaction upon resolution of each ticket.

### 3. APPROVED BUDGET OF THE CONTRACT (ABC)

The agency budget estimate for the project is **THREE HUNDRED THOUSAND AND 0/00 PESOS (Php 300,000.00)**, inclusive of all applicable taxes.

### 4. IMPLEMENTATION OF START DATE AND DURATION OF THE CONTRACT

4.1. Contract period shall be one (1) year from the start date of software implementation.

4.1.1. The effective start of the subscription shall be based on the issuance of the Certificate of Completion and Acceptance by the Bureau.

### 5. SCOPE OF WORK AND TECHNICAL SPECIFICATIONS

The minimum requirement specified in this Scope of the Project shall be complied with. Non-compliance with these requirements is a ground for disqualification.

5.1. Provision and configuration of Client Relationship Management System with the following specification and inclusions:

5.1.1. License access for 16 agents/users

5.1.2. Ticket Management

5.1.2.1. Email ticketing

5.1.2.2. Multiple shared inboxes

5.1.2.3. Automatic email notifications

5.1.2.4. Merge tickets

5.1.2.5. Split tickets

5.1.2.6. Time tracking

5.1.2.7. Ticket templates

5.1.2.8. Satisfaction survey - Standard

5.1.2.9. Assume identity

- 5.1.2.10. Outbound email
- 5.1.2.11. Ticket export
- 5.1.2.12. Annotated image attachments
- 5.1.2.13. Undo send
- 5.1.2.14. Ticket activities
- 5.1.3. Agent Productivity
  - 5.1.3.1. Shared canned responses
  - 5.1.3.2. Personal canned responses
  - 5.1.3.3. Agent collision detection
  - 5.1.3.4. Public and private notes in tickets
  - 5.1.3.5. Filtered search
  - 5.1.3.6. Occasional agents
  - 5.1.3.7. Custom ticket views
  - 5.1.3.8. Tags
  - 5.1.3.9. Quick Actions
  - 5.1.3.10. To-dos
  - 5.1.3.11. Add reminders on to-dos
  - 5.1.3.12. Session replay
  - 5.1.3.13. Canned forms
- 5.1.4. Self Service
  - 5.1.4.1. Knowledge base
  - 5.1.4.2. Auto suggest solutions
  - 5.1.4.3. Community forums
- 5.1.5. Customer Management
  - 5.1.5.1. Custom contact and company fields
  - 5.1.5.2. Merge contacts
  - 5.1.5.3. Customer Journey
  - 5.1.5.4. Customer 360
- 5.1.6. Reporting
  - 5.1.6.1. Agent and group performance
  - 5.1.6.2. Helpdesk in-depth report
  - 5.1.6.3. Ticket drill down in reports
  - 5.1.6.4. Ticket volume trends
  - 5.1.6.5. Time sheet summary report
  - 5.1.6.6. Export reports
  - 5.1.6.7. Save reports
  - 5.1.6.8. Schedule reports
  - 5.1.6.9. Satisfaction survey report
  - 5.1.6.10. Default dashboard
  - 5.1.6.11. Add reminders on to-dos
  - 5.1.6.12. Session replay
  - 5.1.6.13. Canned forms
- 5.1.7. Helpdesk Automation
  - 5.1.7.1. Automatic ticket assignment
- 5.1.8. SLA Management
  - 5.1.8.1. Business rules management through SLA
  - 5.1.8.2. SLA reminders

- 5.1.8.3. Escalation emails for SLA violation
- 5.1.9. Collaboration
  - 5.1.9.1. Linked tickets
- 5.1.10. Ticket Forms
  - 5.1.10.1. Embeddable feedback widget
  - 5.1.10.2. Custom status
  - 5.1.10.3. Custom ticket fields
  - 5.1.10.4. Dependent fields in ticket forms
  - 5.1.10.5. Time tracking and invoicing tools
- 5.1.11. Customizations
  - 5.1.11.1. Custom domain mapping
  - 5.1.11.2. Public customer portal customization
  - 5.1.11.3. CSS customization
  - 5.1.11.4. API access
- 5.1.12. Security
  - 5.1.12.1. Single sign on
  - 5.1.12.2. Single sign on with SAML
  - 5.1.12.3. Advanced password policy for agents and customers
  - 5.1.12.4. DKIM/DMARC - 2 Domains
  - 5.1.12.5. Custom email service
- 5.1.13. Mobile Application
  - 5.1.13.1. iOS Compatible
  - 5.1.13.2. Android Compatible
- 5.1.14. Global Support
  - 5.1.14.1. Dynamic email notifications
- 5.1.15. Apps Social Support
  - 5.1.15.1. Basic Twitter channel
  - 5.1.15.2. Basic Facebook channel
- 5.1.16. Customer Support
  - 5.1.16.1. Knowledge Base
  - 5.1.16.2. Community Forums
  - 5.1.16.3. 24x7 Email support
  - 5.1.16.4. 24x5 Chat support
  - 5.1.16.5. 24x5 Phone support
- 5.2. Must provide BTr an advanced notice in case of scheduled maintenance or service interruption.
- 5.3. Submission of an industry standard Service Level Agreement (SLA) that shall include but not limited to the following:
  - 5.3.1. Provision of 8x5 customer support services;
  - 5.3.2. Support response time:
    - 5.3.2.1. 30 minutes for emergency tickets for the following categories:
      - 5.3.2.1.1. System is down.
      - 5.3.2.1.2. Workflow configuration malfunction.
  - 5.3.3. Two (2) hours response time for technical problem that requires on-site services. For problem reported after 4:00 PM, services shall be rendered 8:00 AM of the following business day.
  - 5.3.4. Deviation from the SLA must have a corresponding performance credit.

- 5.3.5. Provision of a single point of contact for customer support in both areas of network connectivity and internet access.
- 5.3.6. Must respond to request for maintenance at no cost to BTr.
- 5.4. Must transfer to BTr all the data logged in the system once the contract has ended / terminated and thereafter shall certify that the data are no longer available in the system.

## **6. VENDOR REQUIREMENTS**

- 6.1. Bidders must have the capacity and ability to provide maintenance services and technical support.
- 6.2. The Bidder must be operating for 3 years as solutions provider for customer service operations.

## **7. OTHER REQUIREMENTS**

- 7.1. Bidders must submit detailed work plan specifying solution design and detailed activities for the implementation of the project.
- 7.2. Bidders may arrange a schedule, prior to submission of their respective bids, for the conduct of scoping to ensure that all project requirements are fully understood and verified to ensure successful implementation of the project.

## **8. MODE OF PAYMENT**

- 8.1. One-time payment of the contract shall be made upon acceptance of implementation and upon issuance of certificate of completion and acceptance.
- 8.2. Training component shall form part of the requirements for the payment of the contract and must be completed by the bidder after all configuration and/or installation, based on the schedule to be determined by the end-user.

## **9. NON-GRAFT CLAUSE**

The winning bidder warrants that it has not given nor promised to give any money or gift to any officer or employee of the BTr, or any member of the Bids and Awards Committee (BAC), BAC Secretariat or TWG, to secure this contract.

Prepared by:	Reviewed by:	Approved by:
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