

Call Center Software

Request for Proposal

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1. About the RFP

Request for Proposal document (hereinafter the “RFP”) is announced with a purpose to select a company for providing (supply, testing, installation and maintenance) Call Center Software (hereinafter the “software”) and conclusion of the contract with the latter under this RFP and rules thereof.

- 1.1. The RFP package should be submitted by the below mentioned deadline and criteria by the following email address: tenders@ameriabank.am.
- 1.2. The deadline for submission of RFP packages is **18:00 (GMT+4), 11/08/2021 inclusive**.
- 1.3. The RFP is organized by “AmeriaBank” CJSC (hereinafter the “Bank”).
- 1.4. For additional information the interested companies (hereinafter the “Participants”) can apply to:
“AmeriaBank” CJSC
Contact person: Tatevik Avanesyan
Tel.: +374 10 561111
E-mail: Tatevik.Avanesyan@ameriabank.am
- 1.5. Proposals should be signed by authorized person of the Participants and submitted in .pdf format.
- 1.6. All costs related to the preparation and submission of RFP documents should be beared by RFP Participants, which will not have right to request a compensation of such costs from the RFP Organizer.
- 1.7. The Bank has all rights, on its own initiative, to modify the RFP rules for explaining and clarifying particular clauses or correcting possible mistakes therein before the deadline of RFP packages submission. Participants will be informed about such modifications via e-mail.
- 1.8. The purpose of this RFP is to provide the Bidders with information to assist the formulation of their proposals.
- 1.9. The Bank has no obligation to accept any or the lowest quote.
- 1.10. The Bank is authorized to cancel the RFP.
- 1.11. The RFP document is neither an offer letter nor a legal contract, but an invitation for offers/ responses. No contractual obligation on behalf of Bank whatsoever shall arise from the RFP process unless and until a formal contract is signed and executed by duly authorized officers of Bank and the successful bidder.
- 1.12. All offers of the bidders shall be unconditional and once accepted whether with or without modifications by the Bank shall be binding between the Bank and such Bidder.
- 1.13. This RFP does not claim to contain all the information each Participant requires. Each Participant may conduct its own independent investigations and analysis and is free to check the accuracy, reliability and completeness of the information in this RFP.

- 1.14. Proposals will be evaluated based on the combined score of the best technical proposal and the lowest financial proposal.
- 1.15. All the documents included in the RFP package should be in Armenian, English or Russian. If the official language of the presented documents is not English or Russian, then official translation into English or Russian should be submitted. The RFP Organizers are entitled not to consider the documents, which are not in English or Armenian.
- 1.16. Each Participant is entitled to present only one RFP package.
- 1.17. The Bank undertakes to ensure confidentiality of the information marked “confidential” by RFP Participants.
- 1.18. Each document included in the RFP package should be signed by the person, who is entitled to sign in the name of the Participant without a power of attorney, as defined in the legislation of the country where the Participant is registered and/or in the charter of the Participant or by an authorized person, acting based on a duly provided power of attorney.

2. About Ameriabank

Ameria Group of Companies is one of the leading financial groups in the Armenian market providing a wide range of advisory and financial services. The Group renders fundamental and comprehensive financial services to clients representing almost all the sectors of the social and economic activity in Armenia and the region.

"Ameriabank" CJSC is a universal bank offering corporate, investment and retail banking services in a comprehensive package of banking solutions. Ameriabank is one of the most dynamic banks in Armenia and ranked among the country's most stable financial institutions.

Individual/tailor-made approach to each client, innovation, high professionalism and strive for excellence are at the core of our activity.

3. Project Description

Background

The Call Center Software (hereinafter “software”) should receive and perform calls, put calls on hold, provide customizable IVR workflow, provide call analytics in a variety of metrics, allow call transfers and recording options. It also should be integrated seamlessly with other applications, such as CRMs and core banking microservices to get and show client’s necessary information in the software and update. The software should be intuitive and user friendly.

Goal

One of the main drivers of new software integration in Ameriabank is to reduce current call center software and hardware maintenance cost, while increasing the efficiency of CC agents, providing customizable IVR flow to lead callers to complete several actions manually without connecting to the call center. This will allow CC agents to answer more calls with specific and difficult questions. Providing all-in-one software, CC agents will have all the necessary client information shown in one place, decreasing the average call duration of inbound calls.

Scope

- The key process groups that new software should cover are the followings:
 - Handling calls
 - Provide integration opportunity with different tools and applications
 - Provide customizable and flexible IVR
 - User roles
 - Workflow management
 - Configurations and tracking
- Within two months from the entry into force of the contract, the contractor shall deliver and install a fully-integrated (ready-to-use) software including licenses at the Ameriabank, and provide a number of related services as specified in this document including training. **The detailed product development map and product roadmap are described in the appendixes.**
- **The system will undergo an acceptance test of ten days duration. Provided this test is successful, the Bank will sign a certificate of acceptance.**
- Depending on need and without being bound to do so, the Bank may request the contractor by means of order letters to provide a number of additional services including the purchase of system and application upgrades and software add-ons or extensions, technical consultancy assistance in case of development modification or upgrade needs as well as additional training.

4. Requirements

This section includes main requirements for the software.

Functional Requirements

ID	Functional Requirement Description
CC Agent Call Experience	
FR.1	The system should have the ability to perform outgoing calls, call back and to receive incoming calls, showing the phone number and available information derived from the integrated tools/applications.
FR.2	The system should have the ability to show/notify missed calls and perform automatic calls based on the specific rule set.
FR.3	The system should have the ability to connect the caller to the agent, with whom he/she has interacted the last time.
FR.4	The system should have the ability to let CC agents to schedule a call with a caller in his/her space and to be notified about the call X minutes before.
FR.5	The system should have the ability to transfer calls to another device (call pulling) and to handle three side calls (Three-Way Calling). <ul style="list-style-type: none">● Blind transfer - the system should be able to transfer the ongoing call to a chosen CC agent group from the agents' list; the first available agent will pick up the call.● Warm - the system should be able to transfer the ongoing call to another person (e.g. manager) not defined in the agents' list, handling three side calls, but CC agents can leave the call.

	<ul style="list-style-type: none"> • Simple transfer - the system should be able to transfer the ongoing call to the specific CC agent chosen from the CC agents' list; the first agent leaves the call when the next one is connected.
FR.6	The system should have the ability to record the call, both screen and voice. The recording should be available for CC agent, supervisor and others to monitor based on the requirements and permissions. Recordings should be able to be downloaded and opened on the web, saved in our storage and in the client card.
FR.7	The system should have the ability to let agents make comments after the call and resolve the tickets.
FR.8	The system should be able to show the current status of CC agents: available, busy, do not disturb.
FR.9	The system should be able to connect all interaction channels (phone number, email address, SMS, etc.) in one place.
Supervisor Experience	
FR.10	The system should have the ability to monitor calls, meaning that a third-party can join and listen in on an ongoing call, without any notice of the client.

FR.11	The system should have the ability to create different user roles with different access/permission types.
FR.12	The system should provide feature workflow management and different users should have different access levels to the information in each state of the workflow.
FR.13	The system should have the ability to change the status of CC agents manually by supervisors, based on the permissions.
FR.14	The system should have the messaging ability during the call, so that supervisors can send messages directly to a CC agent (or group) through the application. This should be attached to the client card/ information.
FR.15	The system should provide call queue workflow management in the system, so that call prioritization can be done based on the workflow created.
IVR	
FR.16	The system should have an IVR function, which is recordable, customizable and flexible.
FR.17	The IVR should connect the call from the specific phone number to the specific cc agent.
FR.18	The IVR should have the ability to block cards, when choosing that exact command by the caller.
FR.19	The system should be able to automatically route incoming calls to CC agents, according to the routing policy we set up.

FR.20	<p>IVR version 1.0 List of flows:</p> <ul style="list-style-type: none"> ● Information about loans (integration) ● Information about accounts (integration) ● Card blocking (integration) ● Branch working hours ● Online and mobile banking (integration) ● Connect to the last called agent ● Connect to call center ● "Call back" order ● Rate the agent <p>The details are provided in the appendix.</p>
Configuration	
FR.21	<p>The system should have the ability to block/unblock the numbers and show the blocked numbers list. Phone number blocking and unblocking can be done based on the specified rules, including automatic unblocking of the numbers.</p>
FR.22	<p>The system should have the ability to track the actions of users (agents, administrators, and other roles) and keep them in logs/history.</p>
FR.23	<p>The system should have storage and history. The system should save call information (previous calls, recording, etc.) in storage and show them in history.</p>
FR.24	<p>The system should be able to generate the links of recordings and attach them in internal applications.</p>
FR.25	<p>The system should have a configuration that will allow tracking the bill amount per call. The billing system should include countries, operators and pricing.</p>

Integration

FR.26	The system should have the ability to be integrated with different applications (Zangi, CRM/AS Bank, Jira), to post or get client information, to share recordings and other data.
FR.27	The system should have the ability to be integrated with Softphones using sip-to-sip.
FR.28	The system must be able to connect phones via SIP and support sip-to-sip integration with Cisco and other products. The system should be able to become a voice gateway for our ip phone environment, have the ability to be integrated with SIP providers and ensure secure connection
FR.29	The system should be able to be integrated with CRM, so that comments/ information updated, additions completed in the application during the call or after can be saved and shown in the specific client.
FR 30	<p>The system should have the ability to be integrated with AS/CRM and have access to the Data for client identification.</p> <p>Prompt Data before accepting call</p> <ol style="list-style-type: none">1. Not registered number<ul style="list-style-type: none">● IVR flow● Calling Phone number2. Registered number<ul style="list-style-type: none">● IVR Flow● Client Name, Surname● Client code● Phone number <p>The main data for client identification during the call is presented in the Appendix 3</p>

FR 31	<p>The system should have the ability to be integrated with Jira, so that requests/tasks created by the CC agent during the call or after should be moved to Jira and filled in relevant fields.</p> <p>The main types of tasks:</p> <ul style="list-style-type: none"> • Customer request about cards • IT service desk system • Back office Application Process <p>Each task has sub-tasks, by clicking on which should open relevant fields to be completed by the CC agent. Fields can be:</p> <ul style="list-style-type: none"> • Inputs / which are filled in manually • Checkboxes • Fields with the ability to search for a user • Selects / ability to choose options • Attachment • Date <p>The necessary data sub-tasks and flow are described in Appendix 2.</p>
FR.32	<p>In the system, a CC agent should be able to assign a "call back request" from the application to bank staff and the latter should be notified about it (out of the application, Jira integration).</p>
FR.33	<p>The system should be able to show all previous interactions (including channels, ticket resolutions, attached recordings, etc.) of the client in the system, and save every interaction with corresponding resolution information.</p>
FR.34	<p>The system should allow integration with Active Directory, to provide user permissions to CC agents.</p>
<p>Reports and analytics</p>	

FR.35	The system should have the ability to make different call performance analysis.
FR.36	<p>The system should be able to create all kinds of reports about call duration, missed calls, call duration, emails, about waiting time of callers, etc. These reports should be exported and/or integrated to another tool for visualization.</p> <ol style="list-style-type: none"> 1. Calls duration 2. Average duration of conversation 3. Average waiting time of customer 4. Average waiting time of employee 5. Report about the calls answered within the first 10 seconds after the command “Connect to the operator” 6. Report about non answered calls

Non-Functional Requirements

ID	Non-Functional Requirement Description
NFR.1	The system should run in continuous availability mode, either active-active or active-passive.
NFR.2	The system should be able to record continuously.

NFR.3	<p>In the system, the recorded 1-minute file should not exceed 1 megabyte.</p> <ul style="list-style-type: none"> ● Recorded video <ul style="list-style-type: none"> ○ frame width 1024 ○ frame height 576 ○ data rate 97 kbps ○ total bitrate 112 kbps ○ frame rate 0.50 frames/second ● Recorded voice <ul style="list-style-type: none"> ○ mp3 ○ bitrate 16 kbps
NFR.4	The system should be able to run in virtual environments such as VMware, Hyper-V.
NFR.5	The system's server parameters should not exceed CPU 8 core, Ram 24GB.
NFR.6	The system should be able to work with HDD SAS disks.
NFR.7	The system's network bandwidth should be 1 gb/s.
NFR.8	The system should be able to handle 80 CC agents simultaneously.

5. RFP Process, Submission and Evaluation

Eligibility Criteria

Only those applications that fulfil the following criteria are eligible to respond to the RFP. Offers received from the Bidders who do not fulfil all or any of the following eligibility criteria are liable to be rejected.

- The Participant should present evidence to prove that it is the manufacturer, owner and authorized user of the software code used for the purpose of establishment and exploitation of the given software and all intellectual property rights to the mentioned software code belong to it.
- The Participant should submit a reference list of the companies to whom the Participant has supplied, installed similar software. The proven experience in the banking system will be an advantage. It is necessary to provide information on type and volume of works, performed works, list of the buyers with their names and contact details.
- Upon request, the Participant should provide written responses/feedback to other customers.
- The Participant should present the description of technologies and software by means of which it is going to perform the implementation works of software in the Bank.

Structure of Proposal

For purposes of consistency and ease of evaluation, the proposal must consist of the following documents:

1. Executive Summary;
2. The Participant Corporate Information;
3. Overview of Proposed Solution;
4. Overview of Solution Architecture, technical details and functionalities;
5. Hardware and other systems required for successful implementation;
6. Overview of Proposed Implementation Plan and Team;
7. Training, support and maintenance;
8. Financial proposal/you can find more detailed requirements below/.

RFP package includes:

9. Proposal;
10. CVs' of the relevant employees;
11. Other documents that may be required by the RFP Committee of the Bank.

Please name each document by the above mentioned requirement number & name, for example "1.Executive Summary.pdf" .

Training, Support and Maintenance

Support and maintenance fees should be presented for each proposed Service level, including:

- Base for calculation;
- Scope and terms of service (availability, response time, resolution time etc.);
- Type and channel of support;
- Additional charges and fees (if any);

- Any exceptions and limitation for Service level;
- Payment structure and schedule;
- Mandatory period for support and maintenance fees (if any).

The Participant needs to give a description of training that can be delivered by the vendor to users of the software (Bank staff).

The Participant needs to describe in details the offsite and onsite support and maintenance to bank staff.

Financial Proposal

The financial proposal should specify the following elements of the RFP price under separate lines:

- License Price and Scheme if applicable
 - Vendor should specify license requirements
 - If any third party pre-integrated product/solution is proposed as a part of the proposed solutions architecture the proposal shall include separate license prices for those products.
- Implementation costs
 - Implementation costs should be presented and grouped for each proposed release. The implementation costs should include at least the following level of decomposition with required man-days, duration and comments on scope.
- Implementation Services
 - System Configuration and Solution Setup (general config, general processes config and customization, security, access, user and permissions setup);
 - Development and Customization (including language);
 - Report and other documents Development;
 - Trainings (onboarding and on-job);
 - Release 1 Implementation (for more details see the product Roadmap and Product Development Map);
 - Release 2 Implementation (for more details see the product Roadmap and Product Development Map);
Product roadmap is described in the appendix 4.
 - Acceptance Testing;
 - Post Implementation Support (on site for a period after go-live).

All prices should be presented in USD including all taxes of the vendor country (if any) in case of non-resident companies and AMD for residents of RA.

The RFP price should be final and not modified or recalculated during the RFP.

Rules of Rejection

The RFP package presented by the Participant might be rejected, if:

- The application is submitted after the set deadline (date and time) or is not complete;
- The eligibility criteria are not met by the Participant, or
- The RFP documents are not signed and stamped (if applicable) by the authorized person, or
- Any of the presented documents or information is false, or
- The Participant is non-compliant with the functional and non-functional requirements described in the Requirements sections.

Evaluation of Proposals

The RFP documents will be examined by the RFP Committee, according to the following selection criteria:

Non-Price Criteria

- Technical merit (for more details see the matrix below)
- Compliance of description of the software functionality
- Deployment and customization flexibility and speed

Price Criteria

- Monthly/yearly fee for maintenance of the software
- Total price for organization and implementation of the software

Technical Merit

A. Software (100 points max.)

B. User friendliness of trial database (100 points max.)

A. Technical functions of the software

- The technical functions of the software are evaluated. In five different sections merit points will be awarded for functions that go beyond the mandatory requirements. Examples of possible features that would be marked positive are given below for each section.
- Merit points will be awarded for features that provide additional benefits for the end user and the software administrator in the bank. Special interest is given to technical options that enable the software administrator to adapt or change features of the functions.
- The Participant should provide clear and detailed documentation for each section. An overview list of functions with screenshots where appropriate is helpful for the assessment.

Table 1: Technical Functions Merits

Criterion	Merit points
1. Integration Flexibility	20
2. IVR flexibility	20
3. Reporting	20
4. Tech Architecture	20
5. ACD	20
SUBTOTAL A	100

B. User friendliness of trial solution/database

As part of their proposals, the Participants are required to provide access to a trial solution which allows testing its user-friendliness. The trial solution needs to be set up in such a way that its test is self-explanatory, is supplemented by a quick-guide and that during the test any interference on the part of the respective tenderer is excluded (noncompliance leads to exclusion from the tender procedure).

For the purpose of this test and as indicated in the following, aspects of user friendliness relate to the clarity of layout, labelling and icons, the command structure, etc.

Table 2: User Experience Merits

Criterion	Merit points
Caller / Simple IVR flow for finding needed data easily	20
Agent / Simple way to reach customer data	20
Agent / Calls flow and result management	20
Interface for keeping customer service data	20
Supervisor / Clear visual distinction of reports	20

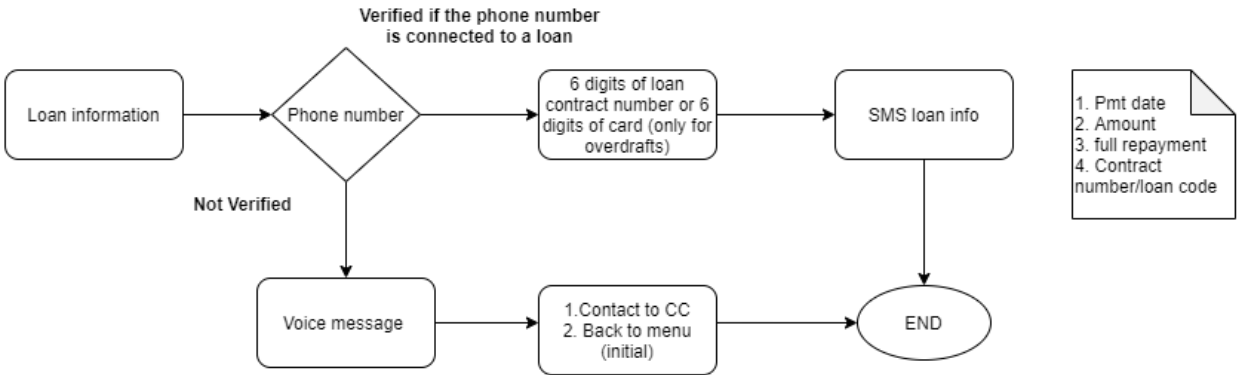
SUBTOTAL B	100
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Contracting

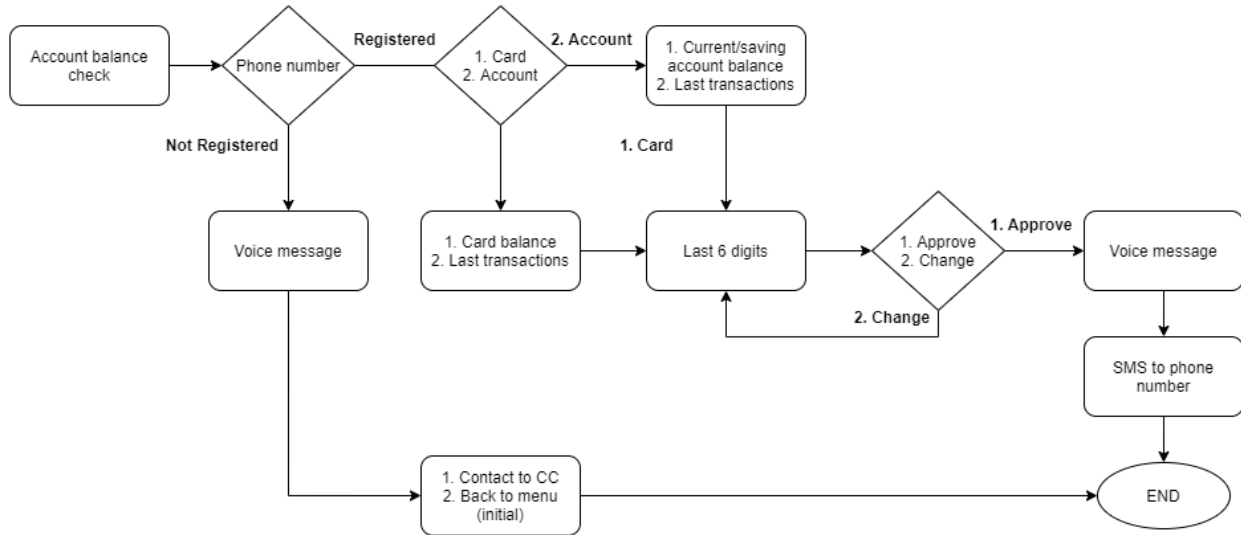
- After the RFP winner is selected, the latter shall be invited to the Head Office of the Bank for nomination of the winner and bilateral signature of the RFP protocol.
- The RFP documents shall be examined by the RFP Committee, according to the evaluation principles described above.
- After bilateral signature of the RFP protocol the Bank shall invite the RFP winner to finalize discussions on several clauses of non-compliance stated in the RFP package (if any) and sign the contract on establishment and maintenance services of the software with the Bank and the RFP winner for relevant terms.
- The contract shall be signed based on the presented RFP package and negotiations in connection with the clauses marked as compliant in the contract.

Appendix 1: The diagrams of IVR flows

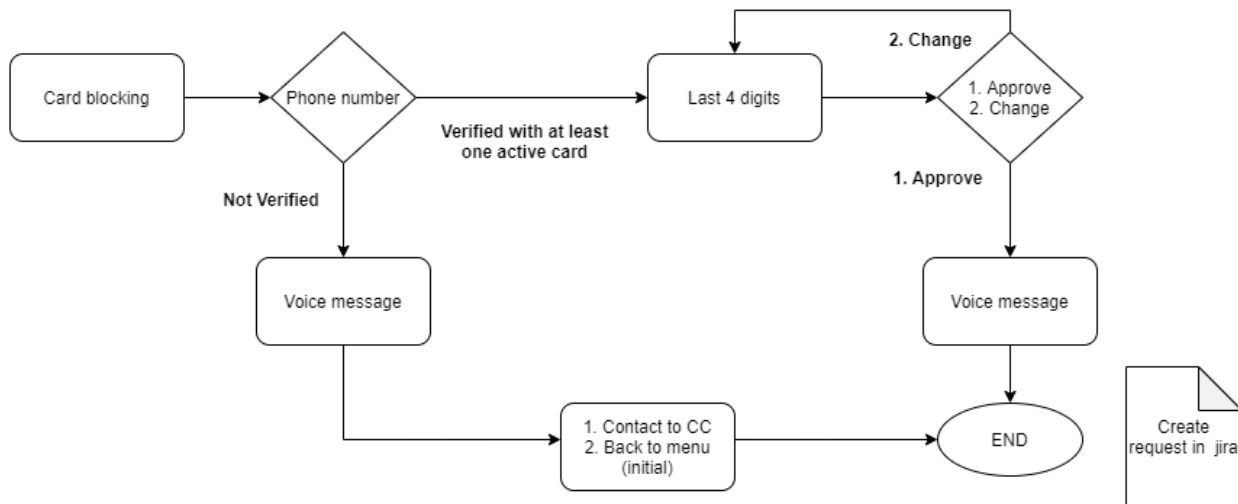
Information about loans



Account balance check



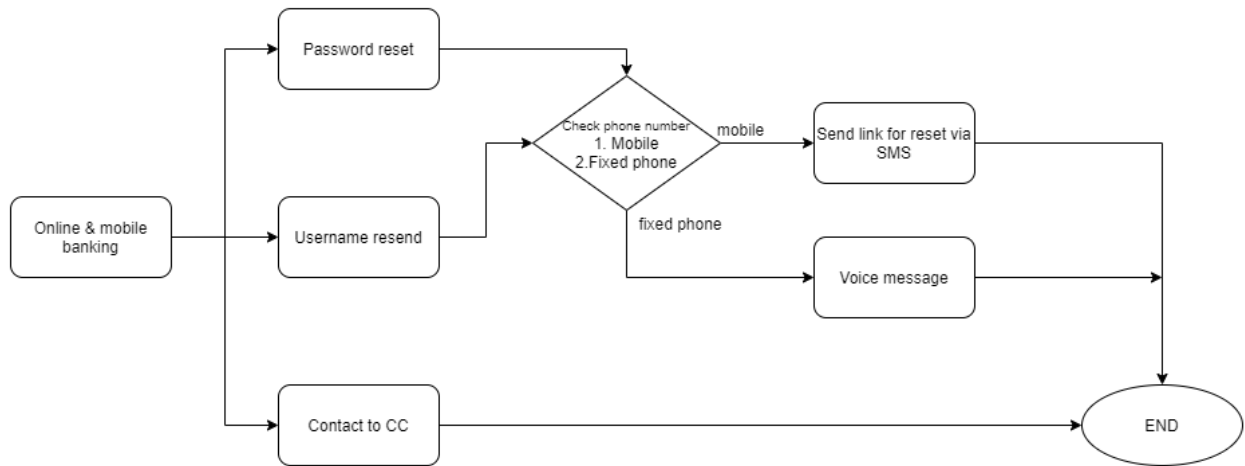
Card blocking



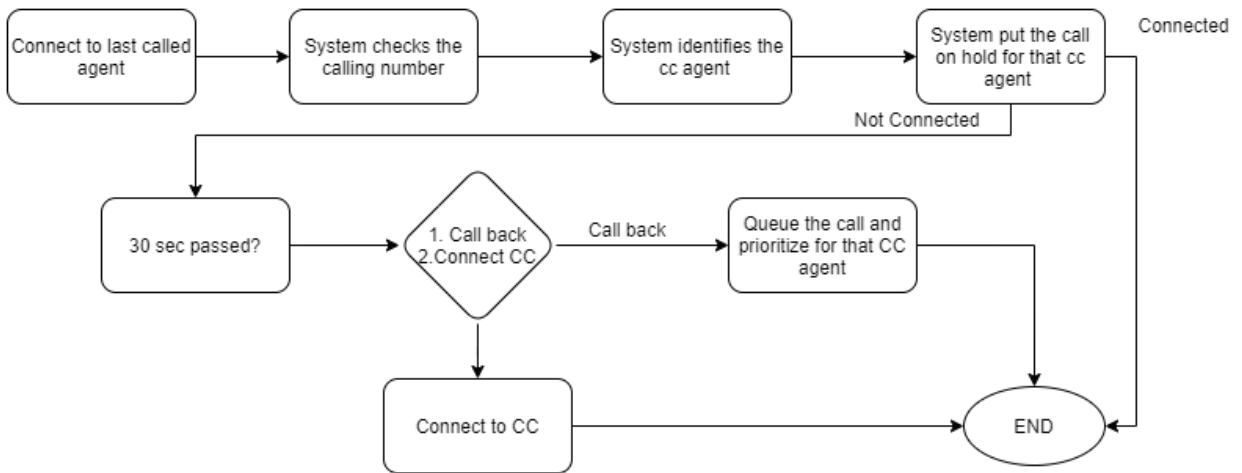
Branch working hours



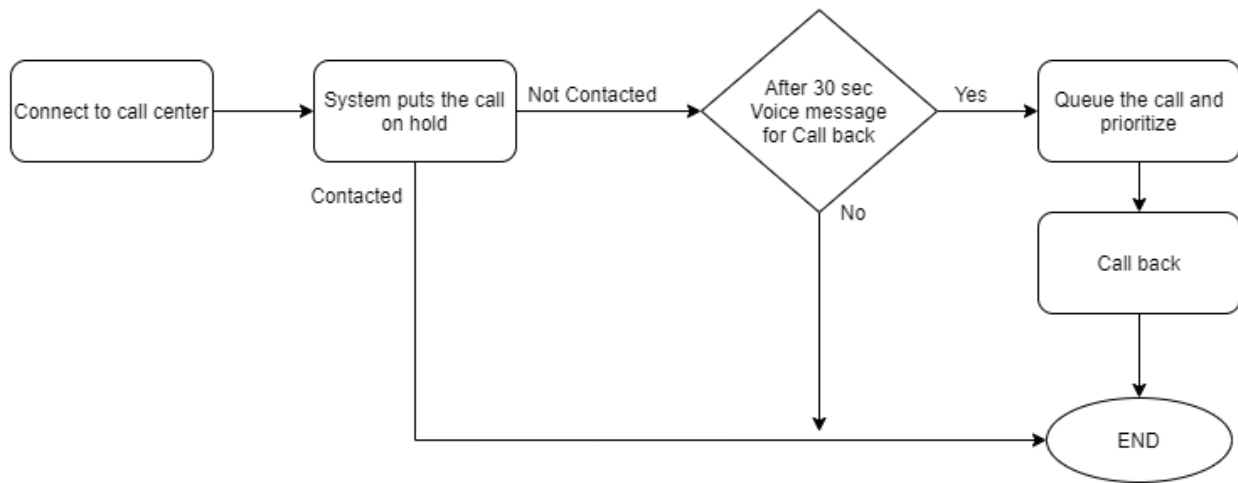
Online and mobile banking



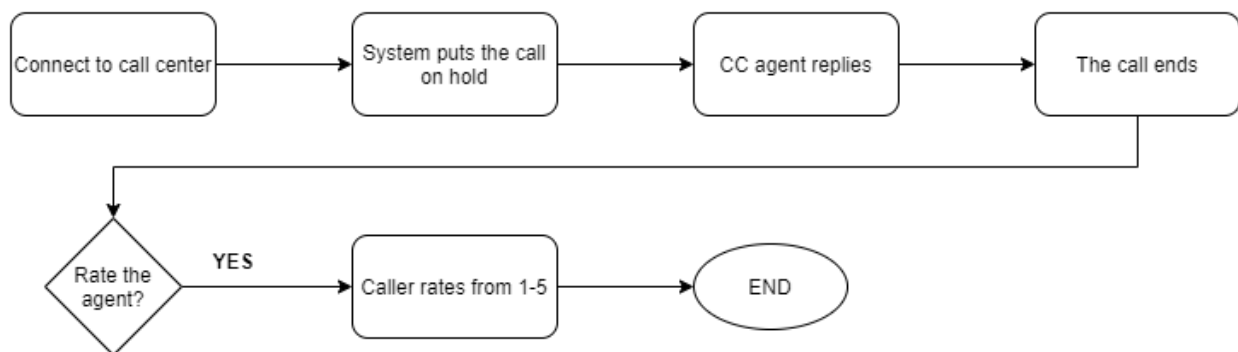
Connect to the last called agent



Connect to call center and "Call back" order

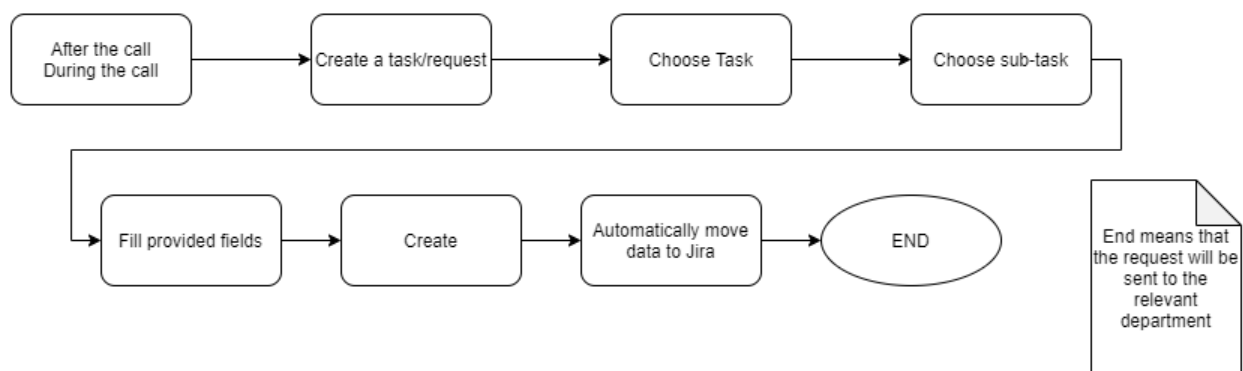


Rate the agent



Appendix 2: Jira-Service Desk Integration

The flow of creation tasks



Necessary Information /general	Date Type
Customer Code	Input
Customer Name / will be filled in automatically in case of client code's filled in	Input
Phone number	Input
Request channel	Input
Card number	Input
Reason for card reissue	Input

Note 2 (optional)	Input
Delivery address /optional	Input
Account Number	Input
Token Code	Input
Client Code/Username	Input
Company name	Input
Amount	Input
Contract number	Input
Basis for adjustment (optional)	Input
Subject	Input
Error message	Input
Error Description	Input
Description	Input
Comment	Input
Number of pledge release	Input
Details	Input
Call Request type / ability to choose options	Select

Priority / ability to choose options	Select
Card Receipt Branch / ability to choose options	Select
Card type / ability to choose options	Select
International or Local / ability to choose options	Select
Tags / Zlock issue, Printer issue, Client bank, Internet bank /Token	Select
Client Type / Corporate or Retail	Select
Is the customer an employee of the Bank or not? / yes or not	Checkbox
OTP (optional) / yes or not	Checkbox
Include the card (cards) in the salary projects? / yes or not	Checkbox
Availability of card fraud insurance / yes or not	Checkbox
Is the card attached in the gift receiver folder? / yes or not	Checkbox
NPA Client (optional) / Yes or not	Checkbox
The employee to whom the request is addressed / Ability to search for a user	Search
The employee's group of colleagues / Ability to search for a user	Search
Head / Ability to search for a user	Search
Line manager / Ability to search for a user	Search

Date / ability to choose options	
Attachment (optional)	

Appendix 3: Data for client Identification

Customer	Birth Date
	Registered / residential address
	Passport / social card number
	e-mail
	Client opening branch

<p>Services</p>	<ul style="list-style-type: none"> ● Account <ul style="list-style-type: none"> ○ Type / Currency ○ Account number ○ Balance ● Card <ul style="list-style-type: none"> ○ Type / Currency ○ Card / Account number ○ Available / Current balances ● Loan <ul style="list-style-type: none"> ○ Type / Currency ○ Contract number / loan code ○ Initial / current amount ● Deposit <ul style="list-style-type: none"> ○ Type / Currency ○ Contract number ○ Initial / Current amount
	<ul style="list-style-type: none"> ● Account / Card Transactions <ul style="list-style-type: none"> ○ Amount / Currency ○ Kind / credit, debit ○ Type / cash in, cash out, pos, transfer to account ○ Beneficiary Name / Account / only for transfers ○ Date ● Deposit / Loan Transactions <ul style="list-style-type: none"> ○ Amount ○ Type ○ Date

Appendix 4: Product Roadmap

Release 1	Release 2	Release 3	Release 4	Release 5	Release 6
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Basic configuration: Integration with Zangi	IVR basic flows without integration	Storage for keeping, call information: Integration with CRM	Customer data: Integration with AS	IVR full flows: Integration with AS	Integration with Jira
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