

Request for proposal
Implementation of call center

Tbilisi, 2017

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Abbreviations and Notions

The following abbreviations and notions are used throughout the submitted document and all appendixes:

CCS	Call Center Software
RFP	Request for Proposal
Solution	All the software required for normal operation of Call Center
Tender	1. an answer to Request for Proposal 2. a process of a selection
Implementer	Company, selected as partner



1. General terms and conditions

1.1. Introduction

1.1.1. Executive Summary

Aldagi would like to develop internal call center unit, therefore announcing tender to purchase call center software licenses (hereinafter referred to as call center solution or CCS).

Aldagi is soliciting proposals for the purpose of selection of the Solution that the most adequately meets its requirements.

During and after the selection process Aldagi:

- 1) will announce tender publicly on www.jobs.ge and www.tenders.ge;
- 2) will send RFP to a number of CCS vendors;
- 3) will apply evaluation model to identify short-listed vendors;
- 4) will observe demonstrations of the CCS functionality conducted by short-listed vendors;
- 5) will perform reference visits to other companies with CCS implemented by vendor;
- 6) will perform contract negotiations for the conditions under which the implementation project will be executed;
- 7) In case of successful negotiations, Aldagi plans to sign the CCS Implementation Contract with the winner of the Tender. Aldagi reserves the right not to procure CCS licenses and not to conclude the agreement on implementation of the Solution if no solution acceptable to the Aldagi is specified during the analysis and definition phase.

If, subject to signing the contract as defined in clause 1.5.4, at any stage of the project the Tenderer shall involve an employee or employees from outside of Georgia, the Tenderer shall be responsible for conformance of their employment and activities with the labor legislation of Georgia. The Tenderer shall bear all costs associated with acquiring all permissions, certifications and other documentation required by Georgian law.

The RFP documents are prepared in English only.

1.1.2. Aldagi company profile

Aldagi is a Joint Stock Company with shares not traded publicly. Aldagi operates as an insurance company in Georgia. It offers homeowners, motor, life, non-government pension, property, machinery breakdown, electrical equipment risks, contractors' risks, cargo, liability, and personal accident insurances services to both corporate and retail customers.

The Company employs about 280 people in Tbilisi Headquarters and up to 20 more specialists in branch offices around the country. Besides Tbilisi, Aldagi has 4 offices in Georgia (1 to 4 employees).

The total headcount is estimated at 320-330 during the next year, considering Aldagi possible expansion.

The Company is 100% owned by JSC Bank of Georgia.

Based on 2016 data, ALDAGI holds 37%, the highest share of the property and casualty insurance market.



1.1.3. User count estimation

12 users, with a possibility to extend to 20 users during next two years.

1.1.4. Statement of confidentiality

These RFP documents contain proprietary information. Each Tenderer is entrusted to maintain confidentiality in regard to such information. The information contained in the RFP documents can be reproduced in whole or in part only with a written permission of Aldagi.

The Tenderer agrees to maintain the confidentiality of information provided in RFP documents using the same precaution measures as it uses to ensure the confidentiality of its own proprietary materials. Access to the enclosed materials shall be restricted to those engaged in the development of the reply to this Tender.

Information provided by each software vendor will be considered confidential and will be used for the sole purpose of evaluating a potential business relationship with the respective Tenderer.

1.1.5. Costs of Tenderers

The Tenderers shall bear all costs associated with the preparation and submission of their Tenders. Regardless of the conduct or outcome of Tendering, Aldagi shall in no case be responsible or liable for those costs.

1.1.6. Tender time table

Project scheduling will be organized according to the following milestones:

No	Stage	Deadline
1	Website notification	15.03.2017
2	RFP distribution	15.03.2017
3	Proposals submission deadline	01.05.2017
4	Evaluation and elaboration of the RFP responses	22.05.2017
5	Short list definition	31.05.2017
6	Meeting with short-listed vendors	31.07.2017
7	Decision on selection of the system	04.08.2017

1.2. RFP documents

1.2.1. Clarification of RFP documents

A prospective Tenderer requiring any clarification of these documents can receive them at Aldagi submitting an e-mail message to the following address: CallCenterTender@aldagi.ge

1.3. Preparation of Tenders

1.3.1. Language of RFP documents

The Tenderer must prepare the Tender in English or Georgian language.

1.3.2. Documents comprising the Tender

The following documents shall be included in the Tender:



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- Tender Application Form (for reference see Section 2.1.1) and Attachments – “Description of the Tenderer” and “Software description” (for reference see Sections 2.1.2 and 2.1.3);
- Proposal - providing a brief description of the Solution and services
- Full list of the software that is part of the CCS with breakdown by:
 - List of software which are mandatory for normal operation of the CCS;
 - List of software which are additional features or modules.
- Estimated project plan and proposed time table;
- Total price breakdown by:
 - Software licenses cost of various modules or components including but not limited to third-party tools, applications, DBMSs, OSs etc. that are necessary for normal operation of software;
 - Estimated implementation cost by each step of the implementation project;
 - Cost of software support and/or maintenance
- List of partners, including those located in Georgia, which may take follow-up support of the Solution after “Go Live!” stage, including contact information and estimated support price.
- Description of software implementation methodology and project management tools.
- Brief resumes of personnel to be engaged in the system implementation (for reference see Section [2.1.5](#));
- A list of customers, which had purchased the software which is being offered as part of the Solution. Brief description of success stories. Please, mention those customers, which are available for reference visit, indicating those which may be visited without the vendor’s participation (for reference see Section [2.1.4](#));
- Copy of the certificate of registration in the Register of Enterprises certified as per the procedure established by the country of the Tenderer and a certified extract from the registration documents of the Tenderer certifying that the Tenderer is involved in the respective business activities;
- Contact data of a person within the Tenderer’s organization to be contacted in case such a need arises.

1.3.3. Tender Application form

The Tenderer shall complete the Tender Application Form included in clause 2.1.1 of the RFP documents, providing a brief description of the Solution and services, indicating the total price, as well as stating the validity period of the Tender.

1.3.4. Tender prices

Tenderers must present fixed price contracts. Prices quoted by the Tenderer shall be fixed during the Tenderer’s performance of the contract and shall not be subject to any increase. Unclear price quotation or specification of rules to be used to render prices shall make the tender non-corresponding and may cause a rejection. Please list assumptions, which were used to calculate price.

Tender price proposal must be effective during six months from scoring date.

1.3.5. Tender currency

Prices shall be quoted in USD.



1.3.6. Deadline for submission of Tenders

Tenders shall be received by Aldagi at the address specified in the clause 2.1.1 not later than by the deadline set forth in clause 1.1.6 of the RFP documents.

1.3.7. Late Tenders

All Tenders received by Aldagi after the deadline for submission set forth in clause 1.1.6 of the RFP documents, will be rejected.

1.3.8. Modification and withdrawal of the Tenders

The Tenderer may modify its Tender or withdraw it by giving a notice in writing that shall be sent before the deadline for submission of Tenders set forth in clause 1.1.6 of the RFP documents.

No Tender may be modified after the expiry of the deadline for submission of Tenders.

No Tender may be withdrawn in the interval between the deadline for submission of Tenders and the expiration of the period of the Tender validity specified by the Tenderer in the Tender Application Form.

1.4. Opening and evaluation of Tenders

1.4.1. Opening of Tenders

Aldagi will open tenders upon receiving. Scoring of tenders will be executed after tender submission deadline, according to time schedule set forth in in clause 1.1.6.

1.4.2. Confidentiality

The names of the Tenderers and tender documentation shall be confidential and shall not be disclosed. The Tenders, and process of their evaluation are confidential.

The information on prices indicated in the Tenders, results of the evaluation of the Tenders as well as information on completion of the tender without awarding the contract shall not be made available to other Tenderers.

1.4.3. Clarification of Tenders

Upon receiving of the Tenders, Aldagi may, at its discretion, request any Tenderer for a clarification of its Tender.

The request for clarification and the response thereto shall be made by e-mail. No change in the prices or substance of the Tender shall be sought, offered, or permitted except as required to confirm the correction of arithmetic errors of the RFP documents.

1.4.4. Comparison of prices

Aldagi will evaluate and compare the Tenders that have been considered to be substantially corresponding and the qualification of the submitters of which conforms to the set requirements.

The comparison of prices shall be based on the prices for payment terms.

1.5. Awarding of a contract

All decisions made during the Tender will be done by appropriate executives of Aldagi.

1.5.1. Evaluation criteria

The Tender will be evaluated on the following criteria:



- Total costs of the proposal
- Requirements to the software offered
- Qualification, experience and availability of the implementation consultants
- Organization and methodology of the implementation project
- Technical support and maintenance proposal
- Existence of local agent

1.5.2. CCS presentation

After the evaluation of the Tenders, the Tenderers will be short-listed.

The presentation shall take place at the site appointed by Aldagi.

The presentation may be done either in Georgian, English or Russian languages.

1.5.3. Reference visits

Tenderer is obligated to suggest two to three customers, available for reference visit. The reference visit shall take place at the site of a customer, appointed in the topic 2.1.4 Implementation team references and chosen by Aldagi.

Reference visits shall be organized by Tenderer, but Tenderer cannot participate in reference meeting with client's personnel. Reference visit time may not exceed 4 hours.

1.5.4. Contract, notification of award and signing the contract

Prior to the expiration of the period of the Tender validity, Aldagi shall notify the successful Tenderer by email on accepting its Tender. Aldagi will invite the successful Tenderer to initiate the contract negotiations. The Contract will be signed in English and Georgian. In case of differences between English and Georgian part, Georgian part will take precedence.

Aldagi reserves the right to commence contract negotiations prior to completion of the Tender process.

Aldagi shall notify the unsuccessful Tenderers within ten days from the decision on signing the Contract with the winner. The Tenderer shall not have the right to submit a claim on Aldagi's action or decision regarding the course of selection of the Tenderers and Tenders.

1.5.5. Management of complaints

If during any Tenderer has complaints regarding course of the Tender or any decisions, made by Aldagi, the Tenderer should write official e-mail to CallCenterTender@aldagi.ge clearly stating subject of the complaint and reason of the complaint.

Aldagi will address this complaint to appropriate executives. When the decision about the complaint is made by Aldagi, Tenderer will be informed by e-mail.



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2. Attachments

2.1.1. Tender Application Form

Date:
From: (full legal name and address):
Tender: Call Center System Selection

To: ALDAGI
Email: CallCenterTender@aldagi.ge

Having examined the RFP documents we, the undersigned, offer to deliver _____ call center system licenses and to implement the Solution in conformity with the said RFP documents for the amount not exceeding USD _____.

We undertake, if our Tender is accepted, to commence delivery of the Solution within _____ days and to complete the implementation of the Solution in the scope of the project within _____ days from the date of the signature of the contract.

This proposal is made based on the following assumptions:

- 1.
- 2.

We confirm that this Tender is valid for period of _____ days from the date fixed for the Proposals submission deadline under clause 1.1.6 of the RFP documents.

Until a formal contract is prepared and executed, this Tender shall, together with your written acceptance thereof and your notification of award, be binding upon both parties.

We understand that you are not bound to accept any Tender you may receive under provisions of the RFP documents.

Dated _____



2.1.2. Description of the Tenderer

If the Tender is submitted jointly by several companies, below specified information shall be provided for each of them, specifying its role and responsibilities.

Item	Description
Company Name	
Address	
Web site	
Contact person	
E-mail of the Contact person	
Telephone Number	
Main contractor/subcontractor and its role and responsibility	
Number of Employees	
Implementation Team Size	
Dedicated Support approach (e.g. possibility of co-operation with Georgian partner)	
Year of establishment of the company	
Ownership details	
Sales Revenue 2015	
Sales Revenue 2016	
Number of installations of offered software	
Software support location	
Average price per man day of consultant	



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2.1.3. Software description

General characteristics of the software solution offered.

Item	Description
Software name	
Software version proposed	
Release date of this version	
Web site	
Application development language used	
User Interface languages supported	
Architecture	
Average time between upgrades (months)	
Min. and max. implementation time (for projects similar in scope to the project)	
Planned date of release of the next software version	
Enhancements planned for next software version	
Total number of completed installations	
Total number of completed localized installations	
Annual maintenance charge	
Total number of new customers within last year and still running implementations	
Possibility of source code deposit at 3rd party	



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2.1.4. Implementation team references

In order to evaluate the adequacy of the Solution for Aldagi, provide references to successful projects.

Please, tentatively arrange reference visits in time range specified in the RFP.

Customer Reference	
Customer Name	
Country of origin	
Web Site	
Business description (Insurance business is preferable)	
Address	
Contact person	
Name	
Title	
Telephone number	
E-mail	
Short project profile	
Time table of project	
Planned	
Actual	



2.1.5. Implementation team CVs

Please provide CVs of the Implementation team members offered for the engagement:

General information

Name:	
Project role:	What is a role of a specialist in the project (consultant, developer, project manager, etc.)
Expected involvement rate:	Expected percentage of time (of the total working time) that this specialist will spend on the engagement

Implementation experience

Please fill the form for each of last 3 projects, made by a specialist

Customer	
Implementation project scope	
Project timeline	When the project was performed
Involvement dates	When the specialist was involved to the project
Project role and involvement	<p>Please briefly describe the processes, which were automated with involvement of the specialist.</p> <p>Please describe the role of the specialist in particular process automatization.</p> <p>In case of Project manager role, if the specialist was involved into management of a subproject, please point this.</p>
Education & Certificates	
Experience with other ERP systems	
Comments	