

Corrigendum-2 to GeM Bid ref no. GEM/2023/B/3283751 dated 29/03/2023 for Selection of vendor for end to end implementation of comprehensive Customer Relationship Management (CRM) solution for 5 years

It is decided to amend the following in respect of the above RFP:

a. GeM bid document (Bid End Date / Bid Opening Date, Page no. 1):

Description	Existing details	Amended details
Bid End Date/Time	05/05/2023, 15:00:00	15/05/2023, 15:00:00
Bid Opening Date/Time	05/05/2023, 15:30:00	15/05/2023, 15:30:00

Sl. No.	Page No.	Section/ Annexure/ Appendix of the GeM bid	Clause No.	Existing	Amended
b.	10	Section B - Introduction	4. Objective	4.3. The bidder should provide the proposed CRM Solution on SaaS Model which should be implemented in comprehensive environment (Hybrid model).	4.3. The bidder should provide the proposed CRM Solution (initially for 15,000 users for taking action and Viewing option for unlimited users) on SaaS Model which should be implemented in comprehensive environment (Hybrid model).
c.	17	Section C - Deliverable and Service Level Agreements	7. Escrow arrangement	Existing clauses	The RFP clause stands deleted
d.	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. Existing clause	The amended clause is attached to this corrigendum.
e.	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.4. Bank will not pay any amount in advance.	8.4. Bank will not pay any amount in advance unless otherwise specified in this RFP.
f.	19	Section C - Deliverable and Service	9. Warranty	Existing clauses	The RFP clause stands deleted

		Level Agreements			
g.	20	Section C - Deliverable and Service Level Agreements	10. Annual Maintenance Contract (AMC) / Annual Technical Support (ATS)	Existing clauses	The RFP clause stands deleted
h.	21	Section C - Deliverable and Service Level Agreements	11. Scope involved during Contract period	11.6. Only licensed copies of software shall be supplied. The selected bidder shall grant an irrevocable perpetual license to the Bank to use the software. Further, all software supplied shall be of latest version.	11.6. Only licensed copies of software shall be supplied. Further, all software supplied shall be of latest version.
i.	57	Annexure-2 Pre-Qualification Criteria		<p>9. Pre-Qualification Criteria:</p> <p>The <u>bidder</u> should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p>Documents to be submitted in compliance with Pre-Qualification Criteria:</p> <p>The bidder should submit purchase order and reference letter duly mentioning that the supplied solution is being used.</p>	<p>9. Pre-Qualification Criteria:</p> <p>The <u>bidder/OEM</u> should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p>Documents to be submitted in compliance with Pre-Qualification Criteria:</p> <p>The bidder should submit purchase order and reference letter duly mentioning that the supplied solution is being used.</p>
j.	58	Annexure-2		10. Pre-Qualification Criteria:	10. Pre-Qualification Criteria:



		Pre-Qualification Criteria		<p>The <u>bidder</u> should have implemented and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company with minimum 500 branches in India as on RFP date.</p> <p>Documents to be submitted in compliance with Pre-Qualification Criteria:</p> <p>The bidder should submit purchase and reference letter for the solution duly mentioning the number of branches being used.</p>	<p>The <u>bidder/OEM</u> should have implemented and maintaining CRM or any similar solution in any organization in BFSI sector/ listed company/PSU Organization with minimum 500 branches in India as on RFP date.</p> <p>Documents to be submitted in compliance with Pre-Qualification Criteria:</p> <p>The bidder should submit purchase and reference letter for the solution duly mentioning the number of branches being used.</p>
k.	66	Annexure-8 Scope of Work		<p>8. The bidder should propose the solution as per Bank's requirements with high availability & secure infrastructure in cloud environment at Data Centre and Disaster Recovery site as per Industry accepted security standards and best practices to deliver the best throughput and performance considering the present as well as annual incremental volumes (for contract period) and the sizing proposed. However, in the capability of the solution, the bidder should be able to convert to cloud/on premises/hybrid based on Bank's requirement/discretion at</p>	<p>8. The bidder should propose the solution as per Bank's requirements with high availability & secure infrastructure in cloud environment at Data Centre and Disaster Recovery site as per Industry accepted security standards and best practices to deliver the best throughput and performance considering the present as well as annual incremental volumes (for contract period)</p>





				any point of time during the contract period.	and the sizing proposed.
l.	74	Annexure-8 Scope of Work	39. The cloud service to be availed by the bidder for Bank shall have the following certifications, in addition to MEITY accreditation	39.4 ISO/IEC 27701 PIM (Privacy Information Management) certified.	39.4 ISO/IEC 27701 PIM (Privacy Information Management) certified <u>or similar certification.</u>
m.	82	Annexure-9 Functional and Technical Requirements	I. Functional and Technical Requirements B. Campaign management	7. Ability to capture the campaign reach and spread. Ability to track campaign response from the users using a variety of metrics - such as count of e-mail pushed, delivered count, mail opened /attachment opened count, responded count, lead generated etc. Track leads and contacts and tie them to a campaign source, and also tie every source to a campaign dollar	7. Ability to capture the campaign reach and spread. Ability to track campaign response from the users using a variety of metrics - such as count of e-mail pushed, delivered count, mail opened /attachment opened count, responded count, lead generated etc. Track leads and contacts and tie them to a campaign source, and also tie every source to a campaign.
n.	96	Annexure-10 Technical Evaluation Criteria		Existing Technical Evaluation Criteria	Amended Technical Evaluation Criteria is attached to this corrigendum.
o.	104	Annexure-17 Bill of Material		Existing Bill of Material	Amended Annexure-17 is attached to this corrigendum.

All the other instructions and terms & conditions of the above RFP shall remain unchanged.

Please take note of the above amendments while submitting your response to the subject RFP.

Date: 02/05/2023

Place: Bengaluru


Assistant General Manager



Amended Clauses

8. Payment Terms

8.1. The payment schedule will be as under and will release after execution of contract agreement:

Sl. No.	Payment Stages	Percentage of Payment	Condition/Remarks
1.	User licenses for CRM solution	100% of Licenses for each year as per Sl. No. 1 of Table-A	Yearly in Advance for each year and on submission of Invoice and Acceptance/Sign off by the Bank and on production of relevant documents
2.	One implementation time	40% of Sl. No. 1 of Table-B	On completing Implementation of Campaign Management, Lead Module, Opportunity Management, User and workflow Management and on submission of Invoice and Acceptance/Sign off by the Bank on production of relevant documents.
		30% of Sl. No. 1 of Table-B	On completing Implementation of Collection Management, Social Media Management, Relationship Management, Customer 360 View and on submission of Invoice and Acceptance/Sign off by the Bank on production of relevant documents.
		30% of Sl. No. 1 of Table-B	On completing Implementation of Call Centre operations, Predictive Analysis & Forecasting, Card management, Dashboard & Reports Management and on submission of Invoice and Acceptance/Sign off by the Bank on production of relevant documents
3.	Cloud hosting charges	Payment will be monthly in arrears on the actual consumption after deducting applicable penalties and Liquidated damages	
4.	Additional requirements/ additional customization/ enhancement	100% payment will be released after Successful Go Live and on production of relevant documents	
5.	Dedicated Onsite Resource & dedicated Offsite resources	Payment will be monthly in arrears after deducting applicable penalties and Liquidated damages.	



Annexure-10 (Amended)
Technical Evaluation Criteria

(Should be submitted on Company's letter head with company seal and signature of the authorized person)

SUB: Selection of vendor for end to end implementation of comprehensive Customer Relationship Management (CRM) solution for 5 years.

Ref: GEM/2023/B/3283751 dated 29/03/2023.

The technical evaluation of the bidder will be carried as per the details furnished below:

Sl. No.	Criteria	Evaluation Parameters	Documents to be submitted	Max marks	Marks Obtained
1.	Implementation experience of Bidder/OEM	Schedule Public/ Private sector Bank in India: 4 Marks NBFCs /Small finance Banks in India: 3 Marks Insurance company/ Any listed company in India: 2 Marks Note: Bank will accept maximum of three implementation under each category for scoring.	Satisfactory performance certificate from client in BFSI along with purchase order/ work order to this effect	27	
2.	Implementation of Social Media Management on following platforms- a. Youtube b. Facebook c. Pintrest d. Instagram e. Twitter f. LinkedIn g. Blogs h. Reddit i. Google Playstore j. Apple App Store	1 Marks for each implementation	The Bidder has to submit the documentary proofs/references from their existing clients to verify the same.	10	
3.	Availability of services in proposed solution to integrate with several modules: i. Customer 360 View ii. Campaign management	Yes: 18 Marks No: 0 Marks (3 Mark for each module Integration)	The Bidder has to submit the documentary proofs/artifacts/r eferences from their existing clients to verify the same.	36	

	iii. Lead Management Module iv. Opportunity Management v. Collection management vi. Social Media management vii. User and workflow Management viii. Dashboard / Reports components ix. Card management x. Wealth Management xi. Call Centre Operations xii. Predictive Analysis & Forecasting				
4.	Presentation by the Bidder: Note: The Presentation is as per the technical & functional requirement/scope of work/other terms as mentioned in RFP to the Bank	Technical presentation will be evaluated on the following parameters: <ul style="list-style-type: none"> • Proposed Solution • IT architecture, Approach and Methodology • Project Governance • Security Aspects • Any Other features as per RFP Document 		27	
5.	Total Marks			100	

* **Declaration:** We hereby confirm that the information submitted above is true to the best of our knowledge. We understand that in case any discrepancy is found in the information submitted by us, our response to this GeM bid is liable for rejection.

Date:

Signature with Seal

Name:

Designation:

Annexure-17 (Amended)

Bill of Material

(Should be submitted on Company's letter head with company seal and signature of the authorized person)

SUB: Selection of vendor for end to end implementation of comprehensive Customer Relationship Management (CRM) solution for 5 years.

Ref: GEM/2023/B/3283751 dated 29/03/2023.

Table -A

Licenses Cost for Customer Relationship Management (CRM) Solution

[Amount in Rs.]

Sl. No.	Item Details	Unit Price per year (Excl. of Tax)	Tax for Column A		Unit Price per year (Incl. of tax)	Quantity	No of Years	Total Cost For 5 years (Incl. of tax)
		A	B % of tax	C Tax Amt	D=A+C			G=(DxExF)
1.	User licenses for CRM solution					15,000*	5	

* The price quoted by the bidder is fixed for entire contract period and the quantity mentioned is indicative only. Bank at its discretion may place order on the selected bidder at the rates mentioned above during the contract period.

Table -B

Implementation Cost for Customer Relationship Management (CRM) Solution

[Amount in Rs.]

Sl. No.	Item Details	Price details (Excl. of Taxes)	Tax for Column a		Total Cost for Implementation (Incl. of Tax)
			% of Tax	Tax amt.	
		A	B	C	D=A+C
1	One Time Implementation Cost as per Scope of Work and Technical Requirements of the RFP				

Table-C
Cloud Hosting charges for 5 years

[Amount in Rs.]

Sl. No.	Description	Hosting charges per month* [Excl. of Taxes]	No. of months	Total hosting charges for 5 years [Excl. of Taxes]	Tax for Column c		Total Hosting Charges for 5 years [Incl. of Taxes]
					Tax %	Tax Value	
		A	B	C=A*B	D	E	F=C+E
1	Cloud Hosting Charges		60				

* The prices mentioned above are indicative only. Cloud hosting charges will be paid based on the actual consumption per month. Bidder to submit consumption report each month.

Table-D
Cost for any additional requirements additional customization/ enhancement

[Amount in Rs.]

Description	Charges Per Man day [Excl. of Tax]	Tax %	Tax Value	Charges Per Man day [Incl. of Tax]	No. of Years	No. of man days#	Total Cost [Incl. of Tax]
	A	B	C	D=(A+C)	E	F	G=(DxExF)
Cost for any additional requirements/ additional customization/ enhancement					5	100	

The price quoted by the bidder is fixed for entire contract period and number of man days mentioned above is indicative only. However, the no. of man days may vary from time to time in total.

Table-E
Charges for dedicated Onsite & Offsite Resources

[Amount in Rs.]

Sl. No.	Description	Charges for one resource per month [Excluding Tax]	No. of months	No. of Resources	Cost of resources for 5 years [Excluding Tax]	Tax %	Tax Value	Cost of resources for 5 years [Including Tax]
		a	b	c	d=axbxc	e	f	g=d+f
1	Cost of Onsite Resources* for comprehensive CRM Solution from go-live 2date		60	4				

2	Cost of Offsite Resources* for comprehensive CRM Solution from go-live date		60					
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Note: The quantity mentioned in Table-E is indicative only. Bank at its discretion can avail dedicated onsite / offsite resources based on the requirement at the same rate during the contract period. Bank at its discretion decide the number of dedicated resources in case of Onsite/Offsite support.

Table-F
Total Cost for 5 Years Contract Period

[Amount in Rs.]

Sl. No.	Details	Cost (inclusive of tax)
1.	Licenses Cost for Customer Relationship Management (CRM) Solution [Column G of Table-A]	
2.	Implementation Cost for Customer Relationship Management (CRM) Solution [Column D of Table-B]	
3.	Cloud Hosting charges for 5 years [Column F of Table-C]	
4.	Cost for any additional requirements additional customization/ enhancement as per Table-D [column G]	
5.	Charges for dedicated onsite & offsite resources for 5 years as per Table-E [Total of Column g]	
6.	Total Cost of Ownership [Sum of 1, 2, 3, 4 and 5 above]	

Undertaking

- i. Bill of material is submitted on the letter head and is signed by an Authorized Signatory with Name and Seal of the Company.
- ii. We confirm that we have gone through RFP clauses, subsequent amendments and replies to pre-bid queries (if any) and abide by the same.
- iii. We have not changed the structure of the format nor added any extra items. We note that any such alternation will lead to rejection of Bid.
- iv. We agree that no counter condition/assumption in response to commercial bid will be accepted by the Bank. Bank has a right to reject such bid.
- v. We are agreeable to the payment schedule as per "Payment Terms" of the RFP.

Date

Signature with seal

Name:

Designation: