

ANNEXURE “H”

TERMS OF REFERENCE (“TOR”)

CIPC BID NUMBER: 18/2018/2019

**DESCRIPTION: INVITATION TO SERVICE PROVIDERS TO
SUBMIT PROPOSALS FOR A CLOUD
BASED CONTACT CENTRE SOLUTION,
INCLUDING A CRM**

***DURATION OF THE CONTRACT: SIX MONTHS FOR IMPLEMENTATION AND TESTING
FOLLOWED BY A 3 YEAR SUPPORT AND
MAINTENANCE.***

TERMS AND CONDITIONS OF REQUEST FOR TENDER (RFT)

1. CIPC's standard conditions of purchase shall apply.
2. Late and incomplete submissions will not be accepted.
3. Any bidder who has reasons to believe that the RFQ specification is based on a specific brand must inform CIPC before BID closing date.
4. Bidders are required to submit an original Tax Clearance Certificate for all price quotations exceeding the value of R30 000 (VAT included). Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of this RFT. Certified copies of the Tax Clearance Certificate will not be acceptable.
5. No services must be rendered or goods delivered before an official CIPC Purchase Order form has been received.
6. This RFT will be evaluated in terms of the **80/20** system prescribed by the Preferential Procurement Regulations, 2001.
7. The bidder must provide assurance/guarantee to the integrity and safe keeping of the information (that it will not be amended/corrupted/distributed/permanently stored/copied by the service provider) for the duration of the contract and thereafter. Failure to submit will invalidate the bid proposal.
8. CIPC reserves the right to negotiate with the successful bidder on price.
9. The service provider must ensure that their work is confined to the scope as defined.
10. Travel between the consultants home, place of work to the DTI (CIPC) vice versa will not be for the account of this organization, including any other disbursements.
11. The Government Procurement General Conditions of contractors (GCC) will apply in all instances.
12. As the commencement of this project is of critical importance, it is imperative that the services provided by the Service Provider are available immediately. Failing to commence with this project immediately from date of notification by CIPC would invalidate the prospective Service Provider's proposal.
13. No advance payment(s) will be made. CIPC will pay within the prescribed period as per the PFMA.
- 14. All prices quoted must be inclusive of Value Added Tax (VAT)**
- 15. All prices must be valid for 90 days**
16. The successful Service Provider must at all times comply with CIPC's policies and procedures as well as maintain a high level of confidentiality of information.
17. All information, documents, programmes and reports must be regarded as confidential and may not be made available to any unauthorized person or institution without the written consent of the Commissioner or his/her delegate.
18. The successful bidder must ensure that the information provided by CIPC during the contract period is not transferred/copied/corrupted/amended in whole or in part by or on behalf of another party.
19. Further, the successful bidder may not keep the provided information by way of storing/copy/transferring of such information internally or to another party in whole or part relating to companies and/or close corporation. As such all information, documents, programs and reports must be regarded as confidential and may not be made available to any unauthorized person or institution without the written consent of the Commissioner or his delegate.
20. The service provider will therefore be required to sign a declaration of secrecy with CIPC. At the end of the contract period or termination of the contract, all information provided by CIPC will become the property of CIPC and the service provider may not keep any copy /store/reproduce/sell/distribute the whole or any part of the information provided by CIPC unless authorized in terms of the declaration of secrecy.
21. The Service Provider is restricted to the time frames as agreed with CIPC for the various phases that will be agreed to on signing of the Service Level Agreement.
22. CIPC will enter into Service Level Agreement with the successful Service Provider.
- 23. CIPC reserves the right not to award this bid to any prospective bidder or to split the award.**
- 24. Fraud and Corruption:**



The Service Provider selected through this Terms of Reference must observe the highest standards of ethics during the performance and execution of such contract. In pursuance of this policy, CIPC Defines, that for such purposes, the terms set forth will be as follows:

- i. "Corrupt practice" means the offering, giving, receiving or soliciting of anything of value to influence the action of CIPC or any personnel of Service Provider(s) in contract executions.
- ii. "Fraudulent practice" means a misrepresentation of facts, in order to influence a procurement process or the execution of a contract, to CIPC, and includes collusive practice among bidders (prior to or after Proposal submission) designed to establish Proposal prices at artificially high or non-competitive levels and to deprive CIPC of the benefits of free and open competition;
- iii. "Unfair trade practices" means supply of services different from what is ordered on, or change in the Scope of Work;
- iv. "Coercive practices" means harming or threatening to harm, directly or indirectly, persons or their property to influence their participation in the execution of contract;
- v. CIPC shall reject a proposal for award, if it determines that the bidder recommended for award, has been engaged in corrupt, fraudulent or unfair trade practices;
- vi. **CIPC also reserves the right to terminate this Agreement by giving 10 (ten) business days written notice to the service provider due to any perceived (by CIPC) undue reputational risk to CIPC which CIPC can be exposed to resulting from the service provider or its management/directors being found to be involved in unethical behaviour, whether in its dealings with CIPC or any other business dealings. Note: "Unethical behaviour" includes but not limited to an action that falls outside of what is considered morally right or proper for a person, a profession or an industry**
- vii. CIPC shall declare a Service Provider ineligible, either indefinitely or for a stated period of time, for awarding the contract, if at any time it determines that the Service Provider has been engaged in corrupt, fraudulent and unfair trade practice including but not limited to the above in competing for, or in executing, the contract.

I, the undersigned

(NAME).....certify that:

I have read and understood the conditions of this Request for Tender (RFT).

I have supplied the required information and the information submitted as part of this RFT is true and correct.

.....

Signature

.....

Date

1. PURPOSE

Customer service is very important to the Companies and Intellectual Property Commission (CIPC). To ensure exceptional customer service, the necessary contact centre tools, systems and integration are required to help achieve CIPC's goals.

The purpose of this document is to indicate the user requirements for a Cloud Based CIPC Contact Centre solution.

2. BACKGROUND

CIPC came into existence in May 2011 after being established by the Companies Act, 2008 (Act 71 of 2008), herein after referred to as the Companies Act, as a juristic person to function as an organ of state within the public administration, but as an institution outside the public service.

The functions of the CIPC are the following:

- Registration of Companies, Co-operatives and Intellectual Property Rights (Trade Marks, Patents, Designs and Copyright) and maintenance thereof
- Disclosure of Information on its business registers
- Promotion of education and awareness of Company and Intellectual Property Law
- Promotion of compliance with relevant legislation
- Efficient and effective enforcement of relevant legislation
- Monitoring compliance with and contraventions of financial reporting standards, and making recommendations thereto to Financial Reporting Standards Council (FRSC)
- Licensing of Business rescue practitioners
- Report, research and advise Minister on matters of national policy relating to company and intellectual property law

Currently, the CIPC makes use of the AVAYA Contact Centre Solution, provided by **the DTI** and is utilising **the DTI** network. However, CIPC needs to establish its own, independent contact centre.

3. REQUIREMENTS

Bidders must response systematically and address all requirements as per TOR from point 3 to point 12, with the same headings. Tender documents not addressing the below point by point, will not be considered.

The cloud-based contact centre solution should be comprised of the following:

- 3.1 A Cloud based Contact centre solution (Contact Centre Software as a Service (CCSAAS)) integrated with CRM system and social media channels to give a single view of the customer across all channels.
- 3.2 It must provide a complete platform that intelligently screens and routes all customer interactions;
- 3.3 Helps with analysing trends. It must also ensure a seamless experience for the customer.
- 3.4 The service provider needs to offer a complete customer interaction platform in the cloud that is flexible, scalable and reliable.
- 3.5 It must be possible for agents to positively and productively interact with customers via any channel. The customer interface must be intuitive and easy to navigate (drag and drop).
- 3.6 The provision should be made for 40 licences and allow for scalability based on capacity and the need.

3.7 Automatic Call Distributor (ACD) and computer/telephony integration

- 3.7.1 The Automatic Call Distributor (ACD) needs to ensure that customer requests are either resolved with self-service or routed according to specific skillsets/requirements. A tiered approach must be possible.
- 3.7.2 Must be a seamlessly integrated interactive voice recording system (IVR). Routing strategies must be created and maintained across all channels.
- 3.7.3 The IVR and ACD to be integrated and built into the Contact Centre platform so that agents won't need to repeatedly request a customer's account or phone number.
- 3.7.4 ACD should be able to read the caller's number then pull call history for the same number.

3.8 Computer Telephony Integration (CTI)

- 3.8.1 CTI must display the relevant customer details on the contact centre agent desktop when it delivers a call and such display must be customisable.
- 3.8.2 Reference numbers for calls need to be created for later retrieval/referencing of call history, including voice recording.

3.9 Interactive Voice Recordings (IVR)

- 3.9.1 The configuration of IVR must be easy and user-friendly based on drag-and-drop or What-You-See-Is-What-You-Get principle. No technician or specialised skill should be needed.
- 3.9.2 It must be possible to change the flow and interactive voice responses within a short time period if required.
- 3.9.3 Must be able to override or amend routing strategies when emergencies or other unexpected situations occur.
- 3.9.4 IVR to make provision for choice for self-service by customer (voice portals for self-service applications, including speech-enabled self-service), or speaking to an agent.
- 3.9.5 The Service Provider must assist with configuring the IVR when implementing the system. Initial set-up of IVR must be done according to CIPC needs.

- 3.9.6 Emergency skillset to “close” contact centre in case of emergencies

3.10 Text to speech (TTS)

- 3.10.1 A program must be available to convert text into spoken voice output, to assist with recording of IVR messages (English).
- 3.10.2 TTS needs to provide a human-like and personalized user experience.

3.11 Analytics

- 3.11.1 The system needs to provide for Interaction analytics to assist with extracting all possible insight from within the contact centre. This includes phone calls, web chat, social media and/or WhatsApp. The purpose is to get to the root cause of repeat calls, giving insight into problem areas, streamlining business processes and improve customer services.
- 3.11.2 Text and speech analytics

3.12 Recording of calls

- 3.12.1 All calls need to be recorded.
- 3.12.2 Contact centre management must be able to retrieve the required call recording based on different search criteria like call reference number, date, time of call, number from which call was received, agent name to etc.
- 3.12.3 All records should be written within the CIPC's Oracle data store, also implying that the systems should integrate at data level with other systems at the CIPC.

3.13 Quality Management

- 3.13.1 Customers should have an option to rate the quality of the service provided at the end of the call.
- 3.13.2 The system should monitor calls that take too long and alert team leader for assistance, if any needed.
- 3.13.3 Evaluation form - Score sheet/coaching forms to be completed online by supervisors based on specific calls and routed to contact centre agents.
- 3.13.4 Agent self-evaluations
- 3.13.5 Performance Management. System linked to reports and quality management to enable easy performance management of agents based on quantitative and qualitative performance
- 3.13.6 There must be provision for monitoring, whispering and barging functionalities available for supervisors and the manager.
- 3.13.7 Managers must be able to monitor contact centre performance any time from a mobile device or desktop.

3.14 Collaborative browsing (co-browsing)

- 3.14.1 The ability to co-browse/share the customer's screen, and permission for screen sharing should be browser-based on the client-side.

3.15 Activity codes

- 3.15.1 Ability for agents to type in activity codes (e.g. when busy with coaching, meetings, tea times etc.) to enable accurate statistics

3.16 Self-Service for calls

- 3.16.1 Self-service: provision for the contact centre system to interface with CIPC systems for application status, annual returns calculations etcetera.

3.17 Omnichannel Experience

- 3.18.1 The contact centre platform must allow CIPC to activate/deactivate different channels as needed. All channels should be accessible on one dashboard.
- 3.18.2 The complete customer journey must be tracked, including interactions across multiple channels.
- 3.18.3 The omnichannel experience should support and store all records of calls, voicemails, whatsapp, SMS, web chats, social media information and all other data and notes in a single system.

- 3.18.4 **Social Media Tool** – to route all interactions which require responses from specific staff and manage all social media interaction.

- Social media like Facebook and Twitter must be included. Others must be able to “plug in” as per new social media developments.
- It must be possible to draw statistics of when requests were received, when it was responded to, who responded, how long it took to respond, status of requests etc.

3.18.5 WebChat facility

- Functionality to set up according to specific categories.
- Reports and analytics required.
- Moderators to review responses.
- Ability to attach picture of file to the chat.
- The web chat should have an intelligent chat bot – it should come with the facility or as a plug-in and the cost shall be borne to the service provider.
- Visitor monitoring and pro-active chat
- The chatbot should interface with CIPC systems using tracking number, entity registration number or customer code to retrieve application information etcetera.
- The web chat should allow monitoring, whispering and barging by the supervisor.

3.19 Wallboards/Dashboards

- 3.19.1 Visibility on all agents and activity should be available from one screen (single 'virtual contact centre view')
- 3.19.2 Adherence must be monitored by using wallboards, which must be set up/configured according to user requirements;
- 3.19.3 Contact centre agents must be provided with customised desktops to guide them through customer interactions. The solution must be flexible so that CIPC is able to alter the user-interface itself (it must not be difficult where extra time and resources must be spent to configure the solution).
- 3.19.4 **Dashboard for each agent with individual agent statistics.** Dashboards on each agent desktop must be available to enable them to view their individual progress and statistics (e.g. number of calls offered, answered, received, calls waiting, waiting time etc. per agent). Agent self-management is important

3.20 Surveys

- 3.20.1 After session surveys (for all channels). The purpose is to gain insight, optimize the experience at the interaction and big picture level.
- 3.20.2 After session surveys must be easy to set up, draw reports from and to upload revised surveys.
- 3.20.3 Option to ask customer if they would like to participate in the survey – either all customers, or option to choose a random percentage of customers.
- 3.20.4 Analytics and report required based on surveys – per agent.
- 3.20.5 Multi-channel surveys

3.21 Reports/Statistics

- 3.21.1 The system should generate reports in tabular, graphical, pdf, word and excel or csv format
- 3.21.2 Reports need to include agent performance, service levels, application and skillset performance.
- 3.21.3 Real-time reporting, as well as historical reporting.
- 3.21.4 Call detail records – reports to indicate where callers hang up (or abandoned calls).
- 3.21.5 Contact centre agent quality reports
- 3.21.6 Custom reporting. Must be able to customise reports according to own business needs. Solution needs to provide database access, as it will enable CIPC to connect to the database and generate custom reporting.
- 3.21.7 Reporting should also include call tracking and analytics to link calls and web chats and other channels like social media with the customer's website visits, to be able to measure and report on contact centre efficiency.
- 3.21.8 Reports must be available with the click of a button.
- 3.21.9 Reports should be downloadable, and it must be possible to export reports to Excel or csv.
- 3.21.10 Examples of reports need to be submitted as part of the tender documentation.

3.22 Headsets

- 3.22.1 The CIPC is currently using the Avaya 112OE IP Desk phone, and the headset used is the Plantronics SupraPlus HW251N and Plantronics Encore Pro HW510 and HW520 headsets. The headset is plugged into the hard phone.
- 3.22.2 The system must be compatible to the current headsets used. If soft phones are required, the service provider need to ensure that current headsets can be utilised.
- 3.22.3 If USB cables are required, the service provider need to provide 40 DA70 USB Cables, to ensure that the current headsets can be utilised without any challenges.
- 3.22.3 Assistance with configuration/setup up of this to ensure full functionality is required.

3.23 Customer Relationship Management System (CRM)

- 3.23.1 Customer insight management. It is imperative to have a Customer Relationship Management System which can provide a single view of a customer.
- 3.23.2 The contact centre system must have a built-in CRM or provide CRM like Salesforce or similar at the cost of the service provider.
- 3.23.3 A single view of the customer is essential. Caller must be identified via a unique identifier like a phone number, account number (customer code). When the call is answered, the agent must already know the name of the customer, their customer code, customer history, their last enquiry, all interactions with staff, and resolutions already provided.
- 3.23.4 Phone numbers of customers must be matched with chats or any other channel.
- 3.23.5 Dashboard - All contact types to be handled through **one interface** which increases productivity by eliminating toggling between screens.
- 3.23.6 The CRM must link to the current case management (Query Resolution) system, as well as to the legacy systems, to enable agents to view the applications, and all interactions with the customer.

3.24 Reliability and Security.

- 3.24.1 Data centre(s) for cloud-based systems must be located in South Africa.
- 3.24.2 System to ensure the highest standards for security, availability and reliability. (Proper login details verification, keeping audit trail).
- 3.24.3 Cloud solution providers should also ensure that the following measures are in place:
 - Secure cloud networks and data hosting
 - Appropriate data encryption levels and firewall protection
 - Strong user authentication
 - Regular password changes

3.25 Up-time guarantee

There should be an uptime guarantee of at least 95%.

3.26 Works with any PBX

- 3.26.1 The contact centre solution must work with any on-premises or cloud PBX (Standard business phone systems).

4. Installation and configuration of the system

- 4.1 Service provider to install and configure system as per contact centre requirements. The system should be hosted by the service provider and the services provided to CIPC via the cloud.
- 4.2 The application should be accessible via different end-user devices (computer, mobile phones, tablets and any end-user access tool)
- 4.3 The system should be accessible with all currently available browsers (Internet explorer, Google Chrome, Safari and Firefox)
- 4.4 The system should be world-call highly available, cost effective and hosted and managed by the service provider.

5. Enhancements

Enhancements should be continuously deployed with zero effort for CIPC's IT department. New features in the solution should be immediately accessible when available.

6. Maintenance

Maintenance for a period of three years.

7. Support

- 7.1 Telephonic support should be provided by the service provider during office hours (07:30 – 16:30)
- 7.2 On-site calls as and when requested – **100 hours per year**. CIPC should not be charged extra for transport to CIPC offices.

8. Training

- 8.1 Training must include user training relating to the system.
- 8.2 First line support training
- 8.3 In-depth training on reports for five staff members (standard reports, as well as ad hoc reports)
- 8.4 Manuals to be provided relating to system, as well as reporting.

- 9 **ICT Infrastructure** – The CIPC requires a detailed technical and architectural requirements documents of the solution (Logical and Physical), specifically an illustration of what ICT infrastructure is needed to host parts of the system within the CIPC. Requirements to be indicated to enable CIPC ICT to cater for the solution (i.e. what type of switches and other hardware are required.)

10 Project Management

- 10.1 Service provider should include costs for a project management service.
- 10.2 The resource will report to the CIPC PMO office.

11 Integration

The proposed solution should be integrated to the CIPC services.

- 11.1 The system should be able to integrate seamlessly with existing CIPC legacy systems, telephony and communications, as well as third party applications within CIPC, without sacrificing performance, reliability or security.
- 11.2 There should be no recurring per-user monthly fees for integrations with third party systems

12 Documents and Handover

- 12.1 The service provider needs to deliver all solution specification documents to CIPC.
- 12.2 There should be a handover to both business and technical CIPC resources.

13 PRICING

Prospective bidders must submit a comprehensive proposal. The onus is upon the prospective bidders to take into account all costs for the duration and the price must be fixed for the duration of the contract.

- 13.1 Cost breakdown must be provided, covering all required aspects in this tender.
- 13.2 Configuration of system, including CRM, integration with CIPC systems, maintenance and support.
- 13.3 Support should include telephonic support should during office hours (07:30 – 16:30)
- 13.4 On-site support as and when requested during the maintenance period – **Provision should be made for at least 160 hours per year. CIPC should not be charged extra for transport to CIPC offices.**
- 13.5 Ability to upgrade/scale to allow for additional functionality and/or licences on pay-as-you-go basis. There should be an option to discontinue with a specific service without a lengthy waiting period if required.
- 13.6 Costs for upgrading of system for the contract period should be included in the price for the tender.
- 13.7 Updates should sync seamlessly with the current system and it should not impact business operations.
- 13.8 The service should not be tied to a location, so that if the organisation needs to relocate to new premises, there should be no costs involved with cancelling the old contract and paying for a new contract.
- 13.9 CIPC should not be charged extra for transport to CIPC offices during installation or maintenance and support, or for meetings.

NB The total price must be carried over to the pricing schedule and will be used to evaluate the bids. Prices must be firm for the duration of the project. PRICE CARRIED OVER TO SBD FORM 3 AND SBD FORM 1 MUST INCLUDE ALL COSTS FOR THE DURATION OF ALL PERIOD STATED ABOVE UNDER PRICING. FAILURE TO COMPLY WITH THIS REQUIREMENT SHALL IMMEDIATELY INVALIDATE THE BID.

14 DURATION OF CONTRACT

14.1 SIX MONTHS FOR IMPLEMENTATION AND TESTING FOLLOWED BY A 3 YEAR SUPPORT AND MAINTENANCE.

15 EVALUATION PROCESS:

The evaluation process will be done in accordance with the following criteria:

Bids will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).

Responsiveness Criteria: Failure to provide the following might result in a bid not to be considered: (minimum requirements)

- a) Bid offers must be properly received on the tender closing date and time specified on the invitation, fully, completed and signed in ink as per Standard Conditions of Tender.
- b) Submission and completion of the Declaration of Interest
- c) Submission of an original and valid Tax Clearance Certificate
- d) Submission of the company's registration certificate from the Register of Companies (CIPC)
- e) Submission of proof of registration with the National Central Supplier Database WITH the Supplier number and Unique Number

15.1 Evaluation Process (Phases)

Bids will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).

EVALUATION PROCESS (PHASES)

THE EVALUATION WILL BE COMPLETED IN 4 PHASES:

- **Phase 1:** Compliance to minimum requirements;
- **Phase 2:** Functional evaluation; evaluation of the bid documents
- **Phase 3:** Presentation; and
- **Phase 4:** Pricing and Preferential Procurement policy.

PHASE 1: COMPLIANCE TO MINIMUM REQUIREMENTS

During Phase 1 all bidders will be evaluated to ensure compliance to minimum document requirements (e.g. Tax Clearance Certificates), ensuring all documents have been completed and that the specified documentation has been submitted in accordance to the bid requirements. All bidders that comply with the minimum requirements will advance to Phase 2.

PHASE 2: FUNCTIONAL EVALUATION

All bidders that advance to Phase 2 will be evaluated on the functionality as presented on the bid response by the same panel as for phase 1. **BIDDERS SCORING 65% OR HIGHER WILL ADVANCE TO PHASE 3.**

No	EVALUATION CRITERIA	Rating					Weight %	Total
		1	2	3	4	5		
1.	A. RESOURCES AND EXPERIENCE 1. Experience of company Bidder must have experience in the implementation of cloud based contact centre with a CRM solution. Company profile to be provided. Score = 1: Experience less than or equal to 1 year Score = 2: Experience greater than 1 year, but not more than 2 years Score = 3 Experience greater than 3 years, but not more than 5 years Score =4: Experience greater than 5 years, but not more than 8 years Score = 5: Experience greater than 8 years						15	
2.	Proven track record (Contactable references) Relevant experience in roll-out of contact centre solutions. Experience, knowledge and technical expertise, including proven track record of undertaking work of this nature. Proof of successful implementation of projects relating to cloud based contact centres need to be provided. Written testimonials of the scope and duration of work undertaken of previous/current clients. (At least three (3) contactable references letters not older than 5 years with clients letterhead for Contact centre implementation) Contactable references must contain the following information which will be scored during evaluation ✓ The testimonial letter to address all the requirements of the criteria as stated above ✓ Name of company for which solution has been rolled out ✓ Duration of the contract ✓ Duration taken to deliver the service ✓ Contract amount ✓ Provide email addresses ✓ Provide telephone numbers ✓ Contact person CIPC may verify references provided by bidders Score = 1: 1 contactable reference provided Score = 2: 2 contactable references provided Score = 3 3 contactable references provided Score =4: 4 contactable references provided Score = 5: 5 or more contactable references provided						10	

LAN, APPROACH AND METHODOLOGY							25	
	Project plan, Approach and methodology - Detailed project plan with timelines (for solution to be rolled out) <ul style="list-style-type: none"> - Project initiation - System implementation methodology Deployment, testing and go-live Score = 1: No project plan and approach and methodology documents provided Score = 2: Poor project plan, approach and methodology Score = 3: Good project plan, approach and methodology with realistic dates Score = 4: Very good project plan, approach and methodology Score = 5: Excellent project plan, approach and methodology							
4.	PROPOSAL REQUIREMENTS NB: Document provided, that systematically address all requirements as per TOR from point 3 to point 12, with the same headings. The following documents are required: Document discussing point 3-12 of TOR. Print screens of the main menu's and the dashboard that the agents will view, need to be provided. Examples of available reports (service level, agent performance, application/skillset performance, talk time/waiting time) Score = 1: Documents not provided, Proposal does not meet the needs of CIPC as outlined in this document Score = 2: Some documents provided, and proposal covers some of the requirements of the document Score = 3: All required documents provided, proposal covers all of the CIPC requirements outlined in the document, and good quality reports and integration Score = 4: All required documents provided, proposal covers all of the CIPC requirements outlined in the document, and very good quality reports and integration Score = 5: Proposal covers all of the CIPC requirements outlined in the document, and excellent reports and integration						30	
5.	CRM system (Mandatory) – Bid documents need to indicate which CRM will be implemented, and it must be demonstrated during the demo. - Provisioning of CRM system (Can be built in as part of solution, or a plugged-in system like Sales Force - Integration of calls, social media and live chat into CRM - Ability to view history of all interactions CIPC had with a client, when they contact CIPC via any of the channels Detail of customer to be displayed on screen when customer call Score = 1: No CRM documents provided Score = 2: Poor CRM proposal Score = 3: Good CRM proposal Score = 4: Very good CRM proposal Score = 5: Excellent CRM proposal						20	
Total							100	

Bids will be evaluated on a scale of 1-5 in accordance with the rating as indicated below 1 = Very poor, 2 = Poor, 3 = Good, 4 = Very good, 5 = Excellent. NB: Please provide details for all the above information to enable proper evaluation.

PHASE 3: PRESENTATION BY BIDDERS

- a. All bidders that advance to Phase 3 will be required to present the solution during a **30 minute demonstration of the proposed solution to the evaluation panel at the CIPC offices.**
- b. **(5 minutes for Introduction and 25 minutes on the product).** This will be undertaken at CIPC, at the expense of the Service Provider.
- c. **BIDDERS SCORING 65% OR HIGHER, WILL ADVANCE TO PHASE 4.**

The following must be included in the presentation:

1. Dashboard /agent view of the system
2. Management view of the system
3. Display the navigation of the system between various menu's, omnichannel options (Calls, web chat, social media)
4. CRM
5. IVR
6. Recordings (how it can be accessed)
7. Reports and analytics (including after call survey)
8. Quality management

PHASE 3: PRESENTATION

No	EVALUATION CRITERIA	Rating					Weight	Total
		1	2	3	4	5		
1.	<p>Dashboards/wallboard providing access to all elements of the system (integrated system - i.e. calls, chat, social media displayed on dashboard. Agent can view the incoming calls, are able to respond to web chat while idling, and dashboard indicating number of waiting calls, web chats) Ease of navigation</p> <p>Score = 1: System not integrated at all, very difficult to navigate</p> <p>Score = 2: Some elements of the system are integrated, difficult to navigate</p> <p>Score = 3 Good integrated system, fairly easy to navigate</p> <p>Score =4: Very good integrated system, easy to navigate</p> <p>Score = 5: Excellent integrated system (All elements i.e. calls, chat, social media displayed on dashboard. Agent can view the incoming calls, are able to respond to web chat while idling, and dashboard indicating number of waiting calls, web chats), excellent navigation</p>						50	
2.	<p>CRM (single view of customer and history of customer interaction displayed)</p> <p>Score = 1: No single view of customer and history displayed</p> <p>Score = 2: Poor view of customer history, not all contacts covered</p> <p>Score = 3 Good single view of customer (history of all channels)</p> <p>Score =4: Very good single view of customer (history of all channels)</p> <p>Score = 5: Excellent single view of customer (history of all channels)</p>						25	
3	<p>All "modules" provided for and easy to access</p> <p>Recordings</p> <p>Quality Management (Barge, whisper, monitoring), online scoring of agents</p> <p>Reports and analytics (including after call survey)</p> <p>Score = 1: Not covering all required modules during presentation</p> <p>Score = 2: Poor covering of all required modules during presentation</p> <p>Score = 3 Presentation covering all modules and good at meeting the requirements as per tender specification i.t.o. point a-c</p> <p>Score =4: Presentation, covering all modules and very good at meeting the requirements as per tender specification .i.t.o. point a-c</p> <p>Score = 5: Presentation covering all modules and excellent at meeting the requirements as per tender specification i.t.o. point a-c</p>						25	
Total							100	

Bids will be evaluated on a scale of 1-5 in accordance with the rating as indicated below 1 = Very poor, 2 = Poor, 3 = Good, 4 = Very good, 5 = Excellent. NB: Bidders can provide any additional information as part of their bid, which they are of opinion could be utilised for evaluation of their bids. **BIDDERS ACHIEVING LESS 65% WILL NOT BE EVALUATED FURTHER**

Phase 4: Preferential Procurement Policy and Pricing

Please Note: CIPC 6.1 Preference Points Claim Form in terms of the PPPFA is attached for claiming above mentioned points, if not completed the company will automatically score 0 points.

Preferential Procurement Policy

The bidders that have successfully progressed through to Phase 4 will be evaluated in accordance with the 80/20 preference point system contemplated in the Preferential Procurement Policy Framework Act (Act 5 of 2000).

Pricing

Pricing will be calculated using the lowest price quoted as the baseline, thus the lowest price quoted will achieve full marks, while all other quotes will achieve a weighted average mark based on the lowest price. **Price schedule should be provided in a separate envelope.**

Description	Total
Price	80
BBBEE	20
Total	100

The bidder with the highest score will be recommended as the successful service provider.

16 BRIEFING SESSION

A compulsory briefing session shall be held at CIPC offices.

<u>COMPULSORY BRIEFING SESSION/ SITE VISITS</u>	DATE: 14 FEBRUARY 2019 TIME: 11H00- 13:30 VENUE: CIPC OFFICE, THE DTI CAMPUS BLOCK D, <u>DG 30</u>, 77 MEINTJIES STREET SUNNYSIDE, “THE DTI” CAMPUS, PRETORIA.
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17. **SUBMISSION OF PROPOSALS**

Sealed proposals will be received at the Tender Box at the Reception, 77 Meintjies Street, Sunnyside, the dti campus, Block F.

Proposals should be addressed to:

Manager (Supply Chain Management)
Companies and Intellectual Property Registration Office
Block F, **the dti** Campus, 77 Meintjies Street,
Sunnyside
PRETORIA

ENQUIRIES

A. Supply Chain Enquiries

Mr Solomon Motshweni OR Ms Ntombi Maqhula
Contact No: (012) 394 5233 /45344
E-mail: SMotshweni@cipc.co.za OR Nmaqula@cipc.co.za

B. Technical Enquiries

Ms Magda Swemmer: E-mail: mswemmer@cipc.co.za
Mr Thobani Mhlongo: E-mail: Tmhlongo@cipc.co.za

BIDS CLOSING TIME: 11: 00 AM

BIDS CLOSING DATE: 01 MARCH 2019

NB: *It is the prospective bidders' responsibility to obtain bid documents in time so as to ensure that responses reach CIPC, timeously. CIPC shall not be held responsible for delays in the postal service.*

Bidders should ensure that bids are delivered in time to the correct address. Late proposals will not be accepted for consideration