



REQUEST FOR PROPOSAL

**PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL
PLATFORM
FOR
AMREF HEALTH AFRICA**

JUNE 2023

PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
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Section 1: Invitation to Tender

1. Amref Health Africa invites tenders from eligible service providers for the Expression of Interest in the procurement and implementation of an Omnichannel platform for Amref Health Africa.
2. A complete set of tender documents can be downloaded from the Amref Health Africa website: **Error! Hyperlink reference not valid.** by interested bidders.
3. Completed Tender Documents for preliminary and technical requirements are to be sent to.
4. Tenders must be sent to the email address below not later than **Friday 16th June, 2023 at 12noon.**
5. Interested eligible bidders are also invited for a pre-bid conference to be held virtually on **Friday 9th June, 2023** from **10am to 12noon.** To access the Link for registration for the pre-bid conference, log onto the AMREF website [http://amref.org /tenders](http://amref.org/tenders).

PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA



Section 2: Background

Amref Health Africa is looking to utilize an Omnichannel platform as part its digital transformation strategy to enhance customer experience, harmonize and monitor all customer engagement channels.

Omni Channel approach integrates the different methods of interaction available to customers (e.g. phone, email, social media, physical visit etc.). It seeks to provide customers with a seamless experience, whether they're on the Amref website, social media handles, sending an email or calling by phone.

The Omni Channel platform should be able to support the following functions:

1. Adding Agents and Supervisors

The platform should allow adding of agents responsible for responding to customer queries and engaging relevant internal stakeholders to resolution customer issues. It should also allow for addition of a supervisor who would monitor the performance of the agents.

2. Enable Internal Collaboration

The platform should enable collaboration with internal stakeholders to resolve customer issues.

3. Configuring Affiliates

Amref has several affiliates and various customer engagement channels.

The affiliates are:

- NGOs in 8 countries in Africa
- Fundraising offices in Europe and North America
- Amref Flying Doctors
- Amref Health Innovations
- Amref International University

The platform should provide separate instances for each affiliate to enable agent to only view customer engagements relevant to their affiliate.

4. Integrate bots with messaging platforms

The platform should integrate to messaging platforms such as WhatsApp, Instagram, Twitter, LinkedIn and Facebook Messenger. This will enable faster response to customer queries and improve their experience.

5. Personalize the customer experience

The platform should evaluate the user profile and turn that into a personalized experience. When prospective customers come to Amref site, they would get answers about relevant products or services.

6. Integrate to Business Applications

The platform should integrate to Amref Health Africa business applications such as the Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) systems.

7. Integrate to Business Phone Line

The platform should integrate to Amref Health Africa business phone lines such as ISDN or mobile numbers.

**PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA**



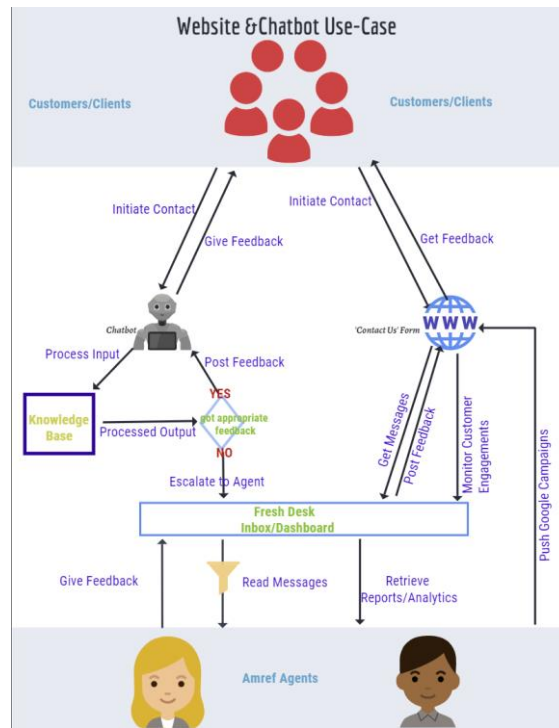
8. Implement and Monitor Service Level Agreements

The platform should have to create tickets and track resolution timelines. It provide a dashboard indicating tickets from all channels in various status (Open, Resolved, Closed e.t.c).

The Omni Channel platform should be able to support the following use cases:

1. Global Communications Use Case

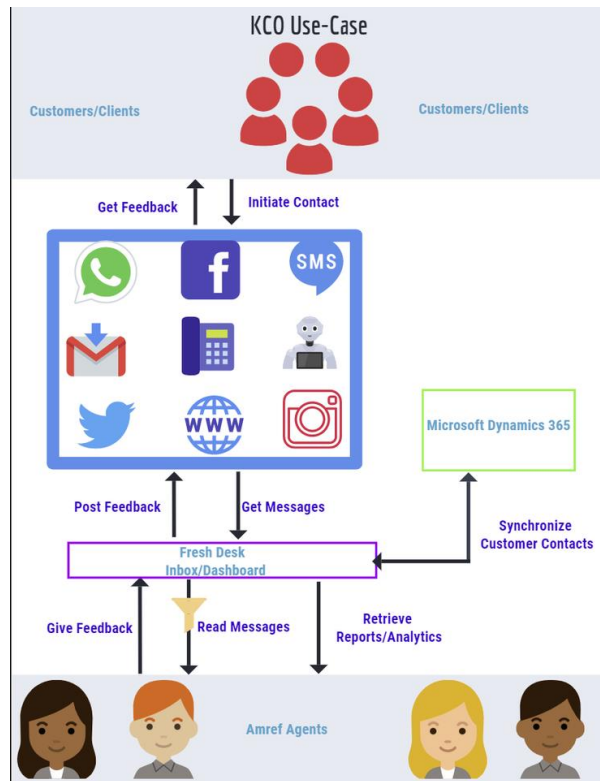
The proposed solution will display all the customer queries from the Amref website, social media handles and WhatsApp number. A chatbot will provide automated answers for FAQs and escalate those that cannot be answered accordingly. The tool will monitor customer engagements on the website, social media handles and WhatsApp number.



2. KCO Use Case

The proposed solution will display all the queries from all the provided channels (Social media, emails, Chatbot, Website contact forms, Telephone) at the Kenya Country Office. The tool will filter the received information for optimal assignment among agents, so as to be resolved accordingly. The tool will integrate to Microsoft Dynamics 365 for customer contacts.

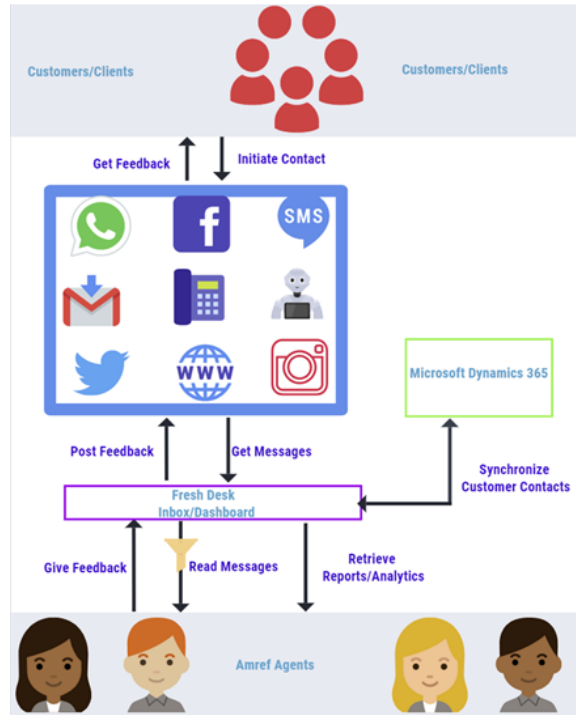
PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA



3. Amref Flying Doctors Use Case

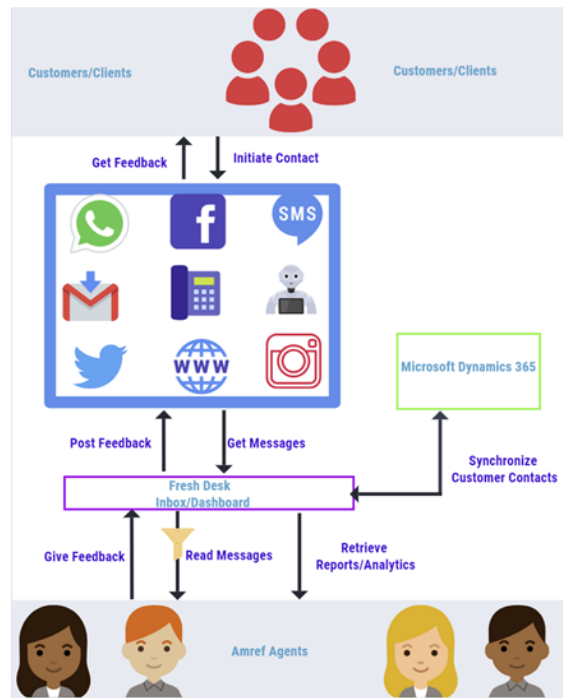
Display all the customer queries from all the provided channels (Social media handles, emails, Chatbot, Website contact forms, Telephone, LinkedIn, WhatsApp). Tracking marketing campaigns through social listening. Integration to the on-prem Dynamics CRM will be need for customer contacts.

PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA



4. Amref International University Use Case

The platform should integrate to messaging platforms such as WhatsApp, Instagram and Facebook Messenger. This will enable faster response to customer queries and improve their experience.



**PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA**



Section 3: Methodology

2.1 Work Plan

Bidders should provide a detailed bid response showing their interceded project approaches and work plan.

2.2 Design and Configuration of an Omnichannel platform

The system should be able to integrate with the existing AMREF business applications such as CRM and ERP.

2.3 Training

The bidder will be expected to;

- Train Amref Health Africa 10 agents, five ICT support staff, two sales reps, and four Software Developers staff in the following areas:
 - I. Use of the system
 - II. System server installation and configuration (for on-premise)
 - III. Omnichannel creation and customization
 - IV. Setup of integration to various systems.
 - V. Configuration of questions and responses.
- Technical Training manuals should be provided for trainees. The training will be staggered as per departments within the Amref Health Africa IT team.

2.4 Implementation of Service Level Agreements and Service Contracts

Standard Information Technology Service Management dictates that a service level agreement for every service offered be provided for by the service provider and managed by the client. We therefore propose to introduce service level agreements with support escalation matrices for the service providers, case resolution times and credits for the client in cases of total outages of the systems over a specified period of time. We shall require one SLA agreement that covers the items below renewable after two years:

- Customer-centric support
- Availability of ICT support
- Upgrading system versions
- Integration and automation
- Any other support

PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA



Deliverables

1. Workplan

2. Omnichannel Platform

- Use of the system
- System server installation and configuration (for on-premise)
- Omnichannel creation and customization
- Setup of integration to various systems.
- Configuration of questions and responses.
- Escalation Matrix

3. System Integration

- Ability to integrate with an existing Microsoft Dynamics 365 and Microsoft Dynamics on-premise using connectors or any other proposed mechanism.
- Ability to interpret payloads from external data sources such as mobile channels, web portals, WhatsApp Bots e.t.c.

4. Training

- Training of Amref Health Africa staff, support staff, system administrators and ICT staff
- Training program provided
- Training materials provided

5. Service level agreements and service contracts

- SLA agreement effected and operational.

Timelines

- a) The project completion should be valid for a period of **ninety (90) days** from the date of issue of award letter but can be extended if the bidder would not have completed the work in the specified period due to some unforeseen circumstances agreed upon by AMREF and The bidder.
- b) Bidders shall provide a detailed bid response showing their intended project approach and work plan.

Project Plan

1. The bidder shall provide a detailed work plan on the intended activities for the duration of the consultancy
2. The system development consultant and AMREF shall work together to ensure the successful installation of the Omnichannel.

**PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA**



Section 4: Conditions to Tender

4.1 Definitions

- 4.1.1 In this Contract, the following terms shall be interpreted as indicated: -
- a) The Procuring entity” means the organization purchasing the service/goods.
 - b) The Tenderer’ means the individual or firm supplying the Goods/services under this Contract

4.2 Application

- 4.2.1 These General Conditions shall apply in all Contracts made by the Procuring entity for the implementation of the Omnichannel platform.

4.3 Standards

- 4.3.1 The services /goods supplied under this Contract shall conform to the standards mentioned in the Technical Specifications

4.4 Use of Contract Documents and Information

- 4.4.1 The tenderer shall not, without the Procuring entity’s prior written consent, disclose the Contract, or any provision therefore, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the Procuring entity in connection therewith, to any person other than a person employed by the tenderer in the performance of the Contract.
- 4.4.2 The tenderer shall not, without the Procuring entity’s prior written consent, make use of any document or information enumerated in paragraph 3.4.1 above
- 4.4.3 Any document, other than the Contract itself, enumerated in paragraph 3.4.1 shall remain the property of the Procuring entity and shall be returned (all copies) to the Procuring entity on completion of the Tenderer’s performance under the Contract if so required by the Procuring entity

4.5 Patent Rights

- 4.5.1 The tenderer shall indemnify the Procuring entity against all third-party claims of Infringement of patent, trademark, or industrial design rights arising from use of the Goods or any part thereof in the Procuring entity’s country

4.6 Project Timelines

- 4.6.1 The successful bidder shall be expected to undertake the project within the time agreed in the contract.

4.7 Special Instructions

- 4.7.1 Submissions on email should clearly indicate the document names for ease of identification.

**PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA**



Section 5: Service Level Agreements (SLAs) and Service Contracts

5.1 Standard Information Technology Service Management dictates that a service level agreement for every service offered be provided for by the service provider and managed by the client. Tenderers must indicate the expected SLA agreements and the annual costs including any subscription costs.

5.1.1 There shall be service level agreements with support escalation matrices for the service providers, case resolution times and credits for the client in cases of total outages of the systems over a specified period of time.

**PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA**



Section 6: Evaluation Criteria

Interested bidders are requested to respond with the following details:

1. The proposed software
2. Estimated cost of acquisition including the licensing model
3. Draft implementation plan/timeframe
4. Post-implementation Support structure

In addition, eligible bidders should provide the mandatory requirements tabled below:

A: Preliminary Evaluation Criteria

MANDATORY REQUIREMENTS		MAX SCORE	SCORE	COMMENT /REMARKS
1.	Copy of Certificate of Incorporation/Certificate of Registration	1 OR 0		
2.	Copy of valid KRA Tax Compliance certificate	1 OR 0		
3.	Must attach the company profile with a brief history about the company/ organization including senior management structure	1 OR 0		
4.	Must submit copies of 2 audited financial reports (2020 and 2021) and each must be signed and dated by the auditor and the firm's Director(s). <i>(Both reports must have unqualified/unmodified auditors' opinion)</i>	1 OR 0		
5.	Must provide a copy of current trading permit relevant to this tender	1 OR 0		
6.	Must provide a copy of current practicing license issued by the relevant body/authority	1 OR 0		
TOTAL SCORE (RESPONSIVE OR NON-RESPONSIVE)		6 MKS		

Note: Bids missing any of the above mandatory requirements numbered 1 to 6 will be considered as non-responsive bid and shall not proceed to the technical evaluation stage.

**PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA**



B: Technical evaluation criteria

TECHNICAL REQUIREMENTS	MAX SCORE	ACTUAL SCORE	COMMENT/REMARKS
<p>The proposed platform should</p> <ol style="list-style-type: none"> 1. Adding Agents and Supervisors 2. Enable Internal Collaboration 3. Configuring Affiliates 4. Integrate bots with messaging platforms 5. Personalize the customer experience 6. Integrate to Business Applications 7. Implement and Monitor Service Level Agreements 	21 Marks		
<p>Modules</p> <ol style="list-style-type: none"> 1. Agents module to add agents and creates clusters. 2. Ticketing module with the ability to create tickets for each customer engagement from all channels. 3. Chat module to allow for live chats between customers and agents. This module should also provide the ability to create a chatbot to automate some response and escalate to an agent when necessary. 4. Social listening module that provides the ability to capture social media streams based on defined topics. 5. Dashboard indicating a summary of tickets received from various channels, resolved and pending. 	10 Marks		
<p>Integration The platform should provide a secure integration to internal business applications i.e Dynamics 365 and Dynamics on-premise</p>	10 Marks		
<p>Technical competencies</p> <ul style="list-style-type: none"> • Provide CV of the lead consultant (s) • CVs of the technical team to be involved in the assignment 	10 Marks		
<p>Timeline for project completion</p> <ol style="list-style-type: none"> a. Over 6 months (5mks) b. Less than 6 months (10mks) 	10 Marks		

**PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA**



TECHNICAL REQUIREMENTS	MAX SCORE	ACTUAL SCORE	COMMENT/REMARKS
6. Milestones a. Business requirements (2mk) b. Customization (2mk) c. Testing (2mk) d. Training (2mk) e. Going live (2mk)	10 Marks		
7. Post-implementation Support structure a. Local (10mks) b. International/Remote (5mks)	10 Marks		
8. Vendor accreditation (5mk)	5 Marks		
9. Licensing Model a. Perpetual License (5mks) b. Subscription/per user License (2mks)	5 Marks		
10. Job references for similar assignments your company has undertaken for institutions within or outside Kenya within the last three years – from 2019 to date (attach LPOs, appointment letters/contracts for the consultancies) in a multi country setup. a. > KES 5m (9 Mks) b. >KES 3m but <KES 5m (5 mks) c. <KES3m (2 mks)	9 Marks		
TOTAL SCORE	/100		
TO BE INDICATED BUT NOT RATED			
11	Estimated cost of acquisition including the licensing model and implementation		
12	Estimated cost of customization, testing, training and data conversion/ migration.		
13	Post-implementation cost and support structure		

Note: Bidders who score below 70% in the Technical requirement will be considered as non-response and therefore will be eliminated at this stage.

PROCUREMENT AND IMPLEMENTATION OF AN OMNICHANNEL PLATFORM
FOR
AMREF HEALTH AFRICA



Section 7: Submission Guidelines

Application guidelines are available in the following website: <http://amref.org/tenders/>. Proposals should be sent via email to **Proposals.Kenya@amref.org** by **16th June, 2023** at 12noon.

Amref Health Africa reserves the right to accept or reject any or all bids and is not bound to give reasons for its decision.