**REQUEST FOR PROPOSAL FOR OUTSOURCED OUTBOUND CALL CENTRE SERVICES**

**dfcu Bank Limited**

**2nd Floor dfcu Towers, Plot 26 Kyadondo Road**

**P.O.BOX 70, Kampala.**

**Attention: Head of Procurement**

**SECTION 1- PURPOSE AND SCOPE OF THIS REQUEST FOR PROPOSAL**

## INTRODUCTION

**dfcu Bank Limited** (“the Bank”) invites firms to respond to the Request for Proposal for **Outsourced Outbound Call Centre Services**

## GENERAL INFORMATION

Guided by our vision” To be the preferred financial institution”, our ambition and purpose is to make more possible by providing innovative financial solutions to our chosen segments, maintain the highest level of service standards to our customers and enhance the well-being of our customers and society. dfcu Bank wishes to outsource its Outbound Call Centre services to support its customer journey engagements overseen by the Customer Experience department. Client engagements to be made would mainly pertain to the Personal and Business Banking segments with a focus on retention, growth and credit collections.

Alongside our having the second largest branch network with over 60 Branches and 1,500 Bank agents country wide. Our customers also enjoy bank services through other channels like online banking, Mobile App, ATMs, Visa Credit & Debit Cards, Money transfer services. Our strategic aspiration is to become a market leader and achieve superior financial performance by transforming from a niche to a universal Bank and leveraging technology to become the next generation Bank 4.0. In the last five years, the Bank has more than doubled in its number of customers, transactions, service points/channels and employees. This has resulted into several change initiatives that include a re-design in the organizational structure, cultural change programs to refine the Bank values, business process mapping/re-engineering, articulating the different customer segments with their respective value propositions and several projects intended to implement the Bank’s strategy.

It is against this background that the Bank wishes to embark on a customer transformation journey to perform a diagnostic check on the experience that our customers have at the different touch points, the pain points, delights and opportunities for improvement to maintain that the highest level of service standards while continuously enhancing their well-being**.** As part of its core activities**,** the Bank intends to acquire **Consultancy Services for Customer Journey Transformation.**

## STATEMENT OF PURPOSE

The purpose of this document is to source for a competent vendor for Outsourced Outbound Call Centre services **with human resource and system architecture to execute customer journey engagements as scheduled.**

# SECTION 2- FORMAT OF RFP RESPONSE AND OTHER INFORMATION FOR BIDDERS

## 2.1 BID SUBMISSION

Please submit hardcopy bids/proposals at below address not **later than Thursday, 1st April 2021, 12:00pm East African Time.**

Separate **TECHNICAL** and **FINANCIAL** hard copy quotations should be submitted as per timeline above and clearly marked RFP, **“Outsourced Outbound Call Centre Services.’’**

1. A cover letter/statement of interest indicating the vendor’s interest in offering the service and highlighting its qualifications to perform this project;
2. Contact person’s details of email and telephone.
3. Technical competence needs to detail
   * Focus of services offered by the firm
   * Technology
   * Compliance and certifications
   * Years in business and company culture
   * Performance and quality matrix

Firms or suppliers are requested to hold their quotations valid for 60 days from the closing date for the submission. The Bank will make its best efforts to arrive at a decision within this period.

All costs pertaining to the preparation of a proposal and negotiations of a contract shall be borne by the firms submitting quotations

As part of evaluation, the top 3 bidders, will be invited to;

* Prepare a presentation of their proposal to dfcu bank online.
* Admit dfcu bank officials into its premises for onsite inspection.

Assuming that the contract can be satisfactorily concluded, the successful bidder shall be expected to commence the delivery within 1month after the issuance of award letter, LPO or Contract.

Hard copy submissions must be received in sealed envelopes and delivered by hand to the address below;

**Bid box**

**Head of Procurement**

**dfcu Bank Limited,**

**2nd Floor, dfcu Towers,**

**Plot 26, Kyadondo Road,**

**P.O. Box 70, Kampala.**

**Not later than** **Thursday 1st April 2021, 12:00 pm East African time.**

**Please note that bids submitted after the deadline shall be disqualified.**

## 2.2 BID OPENING

Opening of bids responding to this proposal document shall be carried out on **2nd Floor, dfcu Towers, Plot 26, Kyadondo Road on** **Thursday 1st April 2021, 12:00 pm East African time.**

**2.3 CONSIDERATION OF QUOTATIONS.**

1. The Bank reserves the right to accept or to reject any bid, and to annul the bidding process and reject all bids at any time prior to the award of the contract, without thereby incurring any liability to any bidder or any obligation to inform the bidders of the grounds for its action.
2. The Bank’s decision/s regarding the acceptance or non-acceptance of a proposal shall be final and the Bank is not obliged to furnish any reason for such decision.

## 2.4 COST OF BIDDING

The Bidder shall bear all costs associated with the preparation and submission of its bid, as well as cost of attending the bid opening. The Bank will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the bidding process.

## 2.5 CLARIFICATION OF BIDDING DOCUMENT

All correspondence related to the proposal shall be made in English. Any clarification sought by the bidder in respect of the request shall be addressed at least **1 day** before the deadline for submission of bids, in writing or email to the persons whose emails have been indicated below.

The queries and replies thereto shall then be circulated to all other prospective bidders (without divulging the name of the bidder raising the queries) in the form of an addendum, which shall be acknowledged by email or in writing by the prospective bidders.

Enquiries for clarifications should be sent to the e-mails below;

[*procurement@dfcugroup.com*](mailto:procurement@dfcugroup.com)***;*** and *dakullu@dfcugroup.com*

## 2.6 AMENDMENT OF BIDDING DOCUMENT

At any time prior to the deadline for submission of bids, the Bank, for any reason, whether at its own initiative or in response to a clarification requested by a prospective Bidder, may modify the bidding documents by amendment. Any amendments would be notified through the same mode in which the RFP was received.

All prospective Bidders are reminded that it is important that bidders give the correct details in the format given on page 1 at the time of collecting/receiving the bid document.

To allow prospective Bidders reasonable time to take any amendments into account in preparing their bids, the Bank may at its sole discretion extend the deadline for the submission of bids based on the nature of the amendments.

## 2.7 DEADLINE FOR SUBMISSION OF BIDS

Bids should be addressed to Head of Procurement and delivered on or before the closing date.

Bids received after the above-specified date and time shall not be considered. Where practicable the Bid will be returned unopened to the Sender, accompanied by an explanation.

**Any bid received by the Bank after this deadline will be disqualified.**

## 2.8 COST STRUCTURE AND NON-ESCALATION

The bidder shall, in their proposal, detail the full cost inclusive of all applicable taxes and incidental costs.

## 2.9 TAXES AND INCIDENTAL COSTS

The prices and rates in the financial offer will be deemed to be inclusive of all **TAXES** where applicable and any other incidental costs. The prices should be for material landed at dfcu Head office

## 2.10 RESPONSIVENESS OF PROPOSALS

The responsiveness of bidders to the requirements of this RFP will be determined. A responsive quotation is deemed to contain all documents or information specifically called for in this RFP document. A bid determined not responsive will be rejected by the Bank and may not subsequently be made responsive by the Bidder by correction of the non-conforming item(s).

## 2.11 CURRENCY FOR PRICING OF TENDER.

All bids in response to this RFP should be expressed **Uganda Shillings only (UGX)** and Expressions in other currencies shall not be permitted

## 2.12 CORRECTION OF ERRORS.

Bids determined to be substantially responsive will be checked by the Bank for any arithmetical errors. Errors will be corrected by the Bank as below:

1. where there is a discrepancy between the amounts in figures and in words, the amount in words will govern, and
2. Where there is a discrepancy between the unit rate and the line total resulting from multiplying the unit rate by the quantity, the unit rate as quoted will govern.

The price amount stated in the Bid will be adjusted by the Bank in accordance with the above procedure for the correction of errors.

***The information contained in the bidding document will be held in confidence by the Bank and used for purposes of determining your suitability for meeting our general requirements for the provision of the services/ goods/ works*.**

# SECTION 3 SPECIFICATIONS

## SPECIFIC OBJECTIVES

1. Engage customers along different stages of the customer journey with targeted outcomes.
2. Cross sell bank products to the customers.
3. Promote and support customers on the alternative channels
4. Periodically pulse check customer engagement and effort scores in Relationship Management and channel efficiency.
5. Receive feedback inform of inquiries, queries and complaints - handling first line support with immediate escalation for further handling.
6. Support with loan recoveries calls
7. Identify and recommend areas for bank evaluation i.e. where the bank can derive the greatest value based on call data analytics to enhance the customer’s experience
8. Provide a sustainable cost-effective model for outbound call handling.

## APPROACH AND METHODOLOGY

## The Outbound Call Centre firm will be required to showcase the ability to operate a full outbound Call Centre with operating systems, human resource and worthy location of a considerable standard for free inspection and review.

## The methodology of data collation during customer engagement will be considered as one of the parameters in the evaluation to select the successful bidder

## Data collection and analysis methods should be well articulated in the proposal submitted to the Bank. Any support that will be expected from the Bank should be highlighted

## The expected outcome and output indicators for each campaign/assignment will be one of the parameters considered during the evaluation process

## The firm should clearly detail the reporting process for assignments undertaken for calls received.

1. The firm should indicate the Call Centre system capabilities, capacity and locations.
2. Overarching human resource policies and framework to support the outbound program need to be highlighted.

## GOVERNANCE AND ACCOUNTABILITY

1. The Outbound Call Centre firm may propose the approach for involving stakeholders during reviews and the extent to which this participation is structured as review, exposure or training and its frequency or duration.
2. Specific support that will be required to be provided by the Bank (such as data for the assignments, site visit coordination, meetings with partners, customers, training etc.) should be requested for by the firm as part of the proposal submitted for evaluation
3. The firm should define their expectations of existing data, information, systems or outlined processes etc., (assumptions) before project initiation within the proposal to be submitted
4. The Outbound Call Centre firm should declare their sub-contractors, extent of their involvement. existing conflicts and the governance process around managing their outputs in the proposal submitted

## DELIVERABLES;

1. Successful engagements made versus do not disturb engagements.
2. Diagnostic reports in respect to customer experience and assignments undertaken.
3. Performance monitoring framework and related Metrics that will be used to gauge success of initiatives undertaken
4. Uninterrupted Workforce and performance management.

## PROFESSIONAL QAULIFICATION AND EXPERIENCE

1. A company with a proven record of providing Outbound Call Centre Services.
2. Evidence of a clear understanding of the Banking and Financial sector in Uganda
3. Company profile (Company history, ownership, contacts and services)
4. Provide evidence of having undertaken similar assignments under a deadline driven environment. Include a reference letter, brief explanation of the work undertaken giving details of the customer profile.
5. CV of the proposed staff -: Team members must show expertise in the handling of customer research, communications, data analytics.
6. A minimum of 3 years for the Junior expert and minimum of 5 years for the Senior expert.

## 3.4 BUSINESS REQUIREMENT

**The quotation MUST indicate unit cost for the service.**

* Pricing should be quoted in local currency (Uganda Shillings) Only
* All applicable taxes should be included in the pricing
* Payment terms 30 days after delivery and invoicing
* Delivery lead time should be clearly stated
* Demonstrate technical capacity/capability to provide the related support services

## DECISION PROCESS AND CRITERIA

The decision will be based on submitted proposals. The successful service provider will be selected based on the following criteria:

1. Adequacy of the Proposed Methodology, Cost and price structure, Number of dedicated resources, Call Centre technology, Experience, Quality of MIS data, Business Premises and Business Continuity; technological capability and operating architecture of the business.
2. Specific experience of the firm/consultant related to the assignment;

* CV of the proposed staff – professional qualifications
* Relevant technical experience

**SECTION 4 QUALITY ASSURANCE AND DECLARATION**

## 4.1 QUALITY ASSURANCE

Please provide details of any quality accreditations for which you have applied.

## 4.2 DECLARATION

1. The Company submitting this bid does have the necessary financial and logistical arrangements in place to perform in accordance with their bids.
2. The information supplied in this document is correct and complete to the best of my knowledge and accurately reflects the capability of;

**Company Name: …………………………………………………………….**

**Name……………………Signature:……………………………….Date: ……………………………**

**This BID is signed in my capacity as: …………………………………………………**