



Central Securities Clearing System PLC

Request for Proposal
Contact Centre Setup

B

3 July 2018

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1. Introduction

Our Company, the Central Securities Clearing System Plc (CSCS) is a Central Securities Depository, licensed by the Securities and Exchanges Commission (SEC). We provide services which include, but not limited to, custody & safekeeping of securities, clearing and settlement of trades executed on recognized trade venues such as The Nigerian Stock Exchange (NSE), NASD, FMDQ and Nigerian Commodities Exchange (NCX).

CSCS is seeking to set up facilities for a Contact Centre. The requirement entails handling calls through VOIP system, Head Phones and CRM Software with call recording facilities which will be integrated to our workflow for business analytics and quality assurance purposes. It is the intent of this RFP that the responder shall provide a complete, end-to-end solution for the Contact Centre set up. The vendor shall provide all design, planning, system architecture, installation, network analysis, training and post installation support for the project.

CSCS's Customer Care Centre (CCC) is located at the Marina Head Office. It currently has a staff strength of 5. The 5 associates attend to walk-in customer enquiries while also answering incoming calls. There is also an Online Sales team comprising of 2 agents who are responsible for all issues relating to CSCS Website subscription. There is a switchboard located at the 14th floor reception for routing calls to internal extensions.

The initial scope is to hire 5 additional call Centre agents dedicated to answering phone enquiries and complaints. Incoming calls that need to be routed to internal CSCS extensions will also be handled by the Call Centre agents. They will be required to manage online chats on our website and other social media engagement. The intent is to free up the CCC associates and the online sales team from answering calls that distract them from their core functions.

The vendor is expected to plan and conduct the installation of the project with minimal impact to daily operations and staff. CSCS will work closely with the vendor to create a working project plan that will achieve these goals.

2. RFP Terms and Conditions

- i. This RFP is about the entire setup of a Contact Center including infrastructure establishment. It is not a contract and no contractual obligations shall arise on behalf of CSCS. CSCS will not be liable for any costs incurred in the preparation and submission of a response to this RFP.
- ii. Pricing should include details of all costs related to software, required hardware, installation, training, and final implementation costs. Charges for individually identifiable components of the proposed IP Communication system, including all associated installation, programming, and cabling must be itemized. Pricing details must also include charges for all components required to connect all applications, all design charges, telecommunication interface charges, and training charges.
- iii. CSCS will select the successful proposal based upon several evaluation factors including features outlined in the RFP; company stability, experience executing similar projects; conversion, training and implementation plan; technical support; and price. The selection will be decided based on the proposal submitted by a qualified vendor that best meets the needs of CSCS as determined by CSCS. CSCS reserves the right to reject any or all proposals.
- iv. All communications relating to this RFP must be directed to the specified key contact persons listed below. All other communications between a respondent and CSCS staff concerning this RFP are prohibited. In no instance is a respondent to discuss cost information contained in a proposal with the CSCS contact persons or any other staff prior to proposal evaluation. Failure to comply with this section WILL result in disqualification of the proposal.

3. Key Contacts

Following are key contacts for information you may seek in preparing your proposal:

- i. Vivian Ashiogwu [Manager, CCC] [08033188355] [ashiogwu.vivian@cscsnigeriaiplc.com]
- ii. Taiwo Otiti [GM, Head of IT and Operations] [08022901998]
[\[otiti.taiwo@cscsnigeriaiplc.com\]](mailto:otiti.taiwo@cscsnigeriaiplc.com)

4. Special Conditions

The nature of the goods to be supplied are:

- i. Turnkey Contact Center solution with
 - a. 10 agent positions
 - b. 2 supervisor positions
 - c. 20 soft phones
 - d. Multiple Channel IVR

- e. Feedback module
- f. Skills based routing module
- g. Social media Integration module
- h. Comprehensive reporting package
- i. Dual homed circuits to give a total of 30 circuits from two providers
- j. Case Management Software
- k. Training for 20 persons on system use
- l. Training for 4 persons on management and supervisory use
- m. Training for four persons on 1st line system support
- n. Training for 20 persons on Contact Center Skills

The method and conditions of payment to be made to the supplier shall be as follows;

- a. The payment shall be made
 - i. direct through the accounts office of CSCS
- b. Payments shall be made in Nigerian Naira in the following manner
 - i. Advance Payment
 - ii. On Delivery EXW
 - iii. On Delivery Acceptance
- c. The period of warranty shall be: 12 months
- d. The period for repair or replacement shall be 24 hours
- e. Arbitration shall take place in: Nigeria

5. Technical Requirements

Contact Center Infrastructure: FORM G - 1		
	<p>SCOPE</p> <p>Contact-Center Infrastructure, implementation and technical training services amongst which should include training on the configuration of the infrastructure and contact centre solutions for 25 staff</p>	
S/No	A - INFRASTRUCTURE RESILIENCE AND ARCHITECTURE	REMARKS / REFERENCE TO ATTACHED APPENDIX
1	What operating system server environments are required for your Contact Center solution/s? CSCS expects that your solution leverages highly on specified redundant servers, & fast multitasking operating systems.	
2	Electrical. Kindly detail the power architecture/ requirements for your platform.	
3	The Contact Center solution must be secure and whilst CSCS's firewalls and security procedures will add a layer of protection, the solution is expected to have security features to guard against unavailability, external attacks and other security risks. Please detail the features provided by your solution and how they will enhance the security profile of the Contact Center solution.	
4	Please state what ILP (Information Loss Protection) considerations, if any, are delivered by your platform.	
5	Does your solution provide capability to store agent activity (account access / view etc.) in a log for audit purposes?	
6	Does your solution currently deploy technology to guard against security intrusions and viruses? Please detail clearly what security tools are in use within your Contact Center platform, if any.	
	B – INTEGRITY/ACCESSIBILITY	REMARKS / REFERENCE TO ATTACHED APPENDIX
7	Please provide necessary information on the CRM application that integrates with your Contact Centre solution.	

8	Please confirm if such integration exists between your CTI layer and the CRM and if so confirm that features like Screen pop and synchronized transfer of voice and data are supported.	
9	<p>CSCS has a walk in customer care center and will require at least 5 extensions that can be used to reach the Contact Center. Kindly outline how your solution implements this, with particular emphasis on how resources like external circuits are utilized by the in-building handsets. <u>Is it possible, for example to route the interactions as internal calls to specific skill groups? Is it possible to route them to IVR ports deployed on the extension side so that external circuits are not taken up by persons already within customer care center? If so, how does this affect reporting on inbound calls?</u></p> <p>Please confirm if your solution support self - services which would enable users to obtain automatic response to stock/securities enquiries that relates to them.</p>	
	C – CALL ROUTING/CTI	
10	Does your solution support Universal routing of media (Voice, email, IM, chat, social media) with unified routing rules? Please expand and explain how the different media are treated.	
11	Are call wrap up time settings flexible on 'agent by agent' or skill basis, to accommodate lower skilled agents?	
12	How many ACD groups can your solution support?	
13	How many skill groups are supported within your solution?	
14	Please explain clearly with the aid of a screenshot, the desktop environment, display image of your solution and features it will deliver to the contact center agents' screen?	
15	<p>What Call distribution options are supported by your solution? Specifically, are the following supported and if so please describe your interpretation of them?</p> <ul style="list-style-type: none"> - Skills based routing - Best condition routing (blends all relevant factors to route a call) - Business rules determined routing - Data driven routing based on assessment of caller where pre identification (CLI, IVR INPUT) has been conducted. This will be relevant for certain clusters to CSCS like Securities, clearing, settlements, other identifiable groupings who may be allocated a calling PIN. 	

16	Does your solution provide AWT (Average Wait Time) announcements to callers?	
	D – SOCIAL MEDIA INTEGRATION / KNOWLEDGE BASE / CASE MANAGEMENT	
17	Please describe, if at all, how your solution integrates with social media platforms like twitter and Facebook and what capabilities exist based on that integration.	
18	Does your solution incorporate a 'knowledge base' as standard or is this provided as part of the CRM package or as an external component?	
19	The solution must include case management which tracks interactions with callers, allows ticket numbers to be allocated and ensure context is applied to the call, especially if it is a repeat call. Please detail how your solution achieves this.	
	E IVR	
20	In a fully horizontal skill based operation where all the agents have the same level of skills it may be unnecessary to route calls VIA the IVR system for SBR (skill based routing). Instead the IVR, in this scenario, may be deployed at the back of the inbound flow to capture calls that come in when no agents are available. <u>This ensures that demographics such as the elderly are not subjected to IVR filtering which they may find daunting.</u> In this instance, the IVR will provide wait messages, offer information scripts, offer call back and provide routing if required. Please confirm, WITH SCHEMATICS if your solution can be deployed in this configuration.	
21	Does your proposed IVR solution support changes to the routing logic on the fly or will system need to be rebooted?	
22	Are <u>ALL</u> the menu prompts and notifications (for instance, "please hold" after selecting an option) on your IVR system capable of being recorded by user to provide seamless voice prompts?	
	F – REPORTING & RECORDING	
23	Please list the main CDR (Call Detail Record) outputs of your proposed solution.	
24	CSCS requires an executive level dashboard that captures vital Contact-Center insights. Kindly describe what your solution delivers in this respect.	

25	<p>Does your solution support Cradle to grave reporting? If so how does it report on calls that have been transferred:</p> <ol style="list-style-type: none"> 1. from the IVR to an Agent 2. From agent to agent 3. From agent to 2nd level support 	
26	<p>Kindly confirm also that the Contact center platform is able to export recordings of all media to external storage environments and state the formats or systems supported for this feature.</p>	
	<p>G – AGENT, SUPERVISORY & SYSTEM MANAGEMENT CAPABILITIES</p>	
27	<p>CSCS requires, for ALL agent and supervisor positions, soft phone capabilities in addition to monaural headsets with advanced noise cancelling capabilities, quick disconnect cord that allows agent to walk away without removing headset, and wide-band audio for all positions. Please detail and depict the proposed headsets provided within your solution.</p>	
28	<p>Can Supervisor screen provide multiple screens for managing various Contact Centre conditions?</p>	
29	<p>Will your system allow management to remove ACD queues from service <i>on the fly</i> during off-peak hours and return them as needed?</p>	
30	<p>Does your system allow remote access for users and/or system administrators?</p>	
31	<p>Will your system permit the <i>dynamic</i> moving of agents between queues whilst the system is in operation?</p>	
32	<p>Can your system permit differential supervisor configuration, allowing different profiles of supervisors to be created based on parameters like reporting, access, and configuration rights.</p>	
33	<p>Can supervisors be discreetly conferenced into an existing call by an agent?</p>	
34	<p>Can a supervisor discreetly barge into an existing call?</p>	
35	<p>Can a supervisor forcibly take over a call from an agent in cases where issues are being misrepresented?</p>	
	<p>J – OUTBOUND DIALING</p>	

36	<p>Please briefly describe the outbound dialing capabilities proposed within your solution. Specifically, also state if, and how your solution supports the following:</p> <ol style="list-style-type: none"> 1. Call progress analysis 2. Blending call campaigns to achieve agent optimization 3. Time taken by the dialer solution to connect a live response to a Contact Centre agent 4. Reporting for agents who perform inbound and outbound tasks (Average Talk time, wrap up etc.) 	
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6. Proof of Concept Requirements

Prior to the selection of a solution, CSCS requires vendor to collaborate with CSCS on the execution of a Proof of Concept project that will meet the following objectives:

- i. Build on CSCS's understanding of the software capabilities, methodologies and best practices.
- ii. Validate key functionality works as expected and meets business requirements.
- iii. Validate that the solution will integrate with existing CSCS infrastructure and key technologies.

7. Compliance to ISO 27001:2013 Standards

Solution should be demonstrably compliant with ISO 27001:2013 Standards.

- Access to the system should be secure. Access mechanisms like SSH, HTTPS, SNMP v3 etc. should be used.
- It shall be possible to bar unauthorized user to connect to the system.
- Authorization Codes: Every user shall have his own authorization code to make outgoing calls thereby ensuring no misuse of the system. System shall give the user complete flexibility to dial his Personal identification number or authorization codes.
- Authentication, Authorization, and Accounting Services- System should have support for (AAA) services whereby it should be able to store and maintain administrator account information on a central server. System should support account information being stored on an external AAA server or locally on the system itself. Both types of accounts may be used at the same time.

8. Timeframe for Completion

Please provide a timeframe for completion of the project. This timeframe will be evaluated. Be advised that timeframes will be part of the contractual agreement; therefore, a realistic timeframe for completion should be provided. CSCS prefers an implementation timeframe of 8-12 weeks

9. Request for Proposal Guidelines

Consequently, we invite interested parties to participate and submit a proposal following the guidelines below:

9.1. Summary

Fill the form in Section 5: **Contact Center Infrastructure: FORM G - 1**

Describe your understanding of the work to be performed and your firm's ability to perform the work within the time frame provided.

9.2. Professional Experience

Please provide the following information:

- i. Name of firm
- ii. Complete address
- iii. Contact person
- iv. Telephone number
- v. Fax number
- vi. E-mail address
- vii. Provide a General Statement of Qualifications that responds to the project background information given above.
- viii. Provide the name and phone number of one or two clients with whom you have worked on a similar project.
- ix. Provide information on your current workload and how you would accommodate this project

10. Ethical Standards

Please note that CSCS requires any prospective Firm to observe the highest standard of ethics during the selection process and execution of the assignment. In pursuance of this policy, CSCS:

- i. define, for the purposes of this provision, the terms set forth below as follows:

- a. "Corrupt practice" means the offering, giving, receiving, or soliciting of anything of value to influence the action of any official of CSCS in the selection process or in contract execution; and
 - b. "Fraudulent practice" means a misrepresentation of facts in order to influence a selection process or the execution of a contract to the detriment of CSCS, and to deprive CSCS of the benefits of free and open competition.
- ii. Will reject a Firm's proposal if it determines that any member of your Firm has engaged in corrupt or fraudulent practices in competing for the assignment.

11. Submission of Proposals

Original and electronic copies of your proposals should be submitted on or before close of business on Wednesday July 18, 2018.

The electronic copy should be sent to:

rfpsubmission@cscsnigeriaplc.com

Kindly forward sealed, original copies to:

CSCS Nigeria PLC

Attention: Isioma Lawal

Head, Internal Control

13th Floor, NSE Building, 2/4, Customs Street Marina, Lagos.

We would also appreciate a response if you decline to submit a proposal.

12. Procedure after Submission

CSCS shall evaluate proposals on the basis of their responsiveness to the requirements of this RFP as outlined above. Each responsive proposal will be given a score. A proposal shall be rejected at this stage if it fails to respond to the requirements. The shortlisted vendors shall be invited for an oral presentation before a Committee of CSCS representatives. The vendor with the highest score after the final presentation will be invited for negotiations.

Negotiations will be held with the aim of reaching an agreement on all points and subsequently engage the successful vendor. If negotiations fail, the vendor with the second highest score will be invited to negotiate an agreement.

After negotiations are completed, CSCS will promptly notify other vendors on the shortlist that they were unsuccessful.

13. Confidentiality

By accepting to take part in this selection process, every vendor shall keep in confidence all information provided in relation to this proposal process and shall not disclose the said information to third parties or use the said information for any other purpose other than in relation to the proposal process. Additionally, in the event that a vendor is not selected, the vendor shall keep in confidence all information provided to it in relation to this proposal and the fact that it has received this proposal.

14. Conflict of Interest

In addition to submitting a proposal in response to this request, all proposals should be sent with a written confirmation that there are no conflict of interest issues that will prevent the firm from taking up this engagement.