

Tender Document Request For Proposal

Tender Ref. No. SUD/IT/CRM/001 Dated 27/06/2011

Notice for inviting tender from reputed OEM vendors of CRM Solution for Star Union Dai-ichi Life Insurance Company Limited.

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Last date of submission of Tender : 08/07/2011

**Star Union Dai-ichi Life Insurance Company Limited
11th Floor, Raghuleela Arcade, IT Park, Sector 30A,
Opp. Vashi Railway Station, Vashi, Navi Mumbai - 400703
Telephone No: 022 39546230/6265**

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TENDER NOTICE

Notice for inviting tender from reputed OEM vendors of CRM Solution for Star Union Dai-ichi Life Insurance Company Limited.

Star Union Dai-ichi Life Insurance Company Ltd. (SUD) is a joint venture between Bank of India & Union Bank of India, India's leading public sector banks and Dai-ichi Mutual Life Insurance, one of the top ten world leaders in insurance which has been incorporated with the primary objective of carrying out life insurance business in India.

This Request for Proposal (RFP) is to invite proposals from Bidders for procurement, installation and commissioning of comprehensive Customer Relationship Management (CRM) Solution at identified locations of Star Union Dai-ichi Life Insurance (SUD LIFE). The Bidder should be an OEM Vendor of a CRM Solution or authorized by an OEM CRM vendor to bid on its behalf. Detailed technical and functional specifications of the total solution have been given in section 2 of this document.

The proposed Customer Relationship Management Solution comprises of the following:

1. Procurement, installation and commissioning of complete CRM Solution, related software, customization, configuration and integration and maintenance.
2. Location for Implementation
 - a. SUD Life Back Office at Vashi, Navi Mumbai, Contact Centre Location and Regional Offices
 - b. DR Site identified by SUD Life
 - c. Warranty for 1 Year/ AMC for a period of five years for all locations

The Bidding Document may be obtained from the Company as under or downloaded from the Website <http://www.sudlife.in> and the bid should be submitted to the office of Star Union Dai-ichi Life Insurance Company Limited , 11th Floor, Raghuleela Arcade, IT Park, Sector 30A, Opp. Vashi Railway. Station, Vashi, Navi Mumbai - 400703

For queries and clarification regarding the RFP please feel free to contact us on the above mentioned address or telephone number or e-mail id.

- Please note that all the information desired needs to be provided. Incomplete information may lead to non-selection.

Date of commencement of RFP	27/06/2011
Date and Time for Pre-bid meet by SUD Life	05/07/2011 4:00 PM
Last date for requesting any clarification	07/07/2011
Last Date and Time for Receipt of Bids at SUD life (Address as given below)	08/07/2011 5:00 PM
Date of opening of Technical Bids	12/07/2011
Date of opening of Price Bids	20/07/2011
Contact Person(s)	Manish Mimani / Ganesh Prasad
Address for Communication and submission of bid	Star Union Dai-ichi Life Insurance Company Limited, 11th Floor, Raghuleela Arcade, IT Park, Sector 30A,

	Opp. Vashi Railway. Station, Vashi, Navi Mumbai - 400703
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SUD Life reserves the right to change the dates mentioned above in the RFP, which will be communicated to all the participating vendors

DISCLAIMERS

The information contained in this Request for Proposal (RFP) document or information provided subsequently to bidder(s) or applicants whether verbally or in documentary form by or on behalf of SUD Life is provided to the bidder(s) on the terms and conditions set out in this RFP document and all other terms and conditions subject to which such information is provided. This RFP is neither an agreement nor an offer and is only an invitation by SUD life to the interested parties for submission of bids. The purpose of this RFP is to provide the bidder(s) with information to assist the formulation of their proposals. This RFP does not claim to contain all the information each bidder may require. Each bidder should conduct its own investigations and analysis and should check the accuracy, reliability and completeness of the information in this RFP and where necessary obtain independent advice. SUD Life makes no representation or warranty and shall incur no liability under any law, statute, rules or regulations as to the accuracy, reliability or completeness of this RFP. SUD Life may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP.

SECTION 1 - ELIGIBILITY CRITERIA

1.1 Consortium

1. If the Bidder is not the owner of the software/Intellectual Property he should provide documentary evidence (e.g. Manufacturers' Authorization Form) for having tied up with all the participating agencies.
2. The Bidder will be the one point contact to provide the solution to the SUD Life. The bidder will provide CRM Solution.
3. The SUD Life reserves the right to inspect such installation/s while evaluating the Technical Bid. The Bidder should obtain permissions and bear all the expenses in this regard.

1.2 Eligibility

1. The bidder should either have its own solution (own the software and or Intellectual Property) or it should have a consortium to provide an arrangement with a manufacturer providing such services.
2. The bidder can have a partner / consortium to provide necessary services as mentioned above. The bidder should have implemented, commissioned, and successfully operationalized the proposed CRM solution and the same should continue to be in successful operation for minimum two insurance companies in India.
3. The bidder should have yearly turn over not less than Rs.15 crores.
4. The bidder must be registering profits for last three years.
5. The bidder should have permanent office in Mumbai.
6. Financial statements i.e. Audited Balance sheet and Profit & Loss accounts for last three years of the bidder and consortium partners will have to be submitted.
7. All systems and related services to be supplied under the Contract shall have their origin in countries allowed as per Import Trade Control Regulations in India.
8. "Origin" means the place where the products are produced or the place from which the related services are supplied. Products are produced when a commercially recognized product results that is substantially different in basic characteristics or in purpose or utility from its components.
9. The origin of products and services is distinct from the nationality of the Bidder.

1.3 Supplier's other project requirements

1. The bidder should enclose details of at least five projects implemented in BFSI sector of similar size with the technical bid giving the following details.
2. Name of the Client
3. Number of locations
4. Nature of the Project
5. Scope of the Project
6. Project Deliverables
7. Architecture of the solution implemented
8. Date of award of Contract
9. Date of commencement of the Project
10. Date of successful commissioning of the Project (Pilot / Live)
11. Name of the person who can be referred to from Clients' side, with Name, Designation, Postal Address, Contact Phone and Fax numbers, E-Mail IDs, etc. (Attach copies of purchase orders)

(Above Details are MANDATORY and to be included in technical bid. Without the above details, the Bid is liable to be Rejected)

SECTION 2 - SYSTEM FUNCTIONAL & TECHNICAL SPECIFICATIONS
Part A - Functional Specifications

Note: In the Last column please mention “B” – if feature is available in base version, “C” – if the feature needs to be customized

Sr. No	Particulars	In Base (B) or Customization(C)
1	General Requirements	
1.1.1	The proposed solution shall be the central access point for all customer interactions and relationships.	
1.1.2	The proposed solution must already exist and is a proven solution.	
1.1.3	The proposed solution must include reference sites.	
1.1.4	The proposed solution must provide comprehensive and easily accessible on-line help facilities to the users.	
1.1.6	The proposed solution must support multiple communication devices such as Web, handheld computers and enable user access customer data anytime, anywhere	
1.1.7	The proposed solution should be deployable on smart clients, e-portal clients, mobile clients and offline clients.	
1.1.8	The solution must allow easy access to data, functionality and provide an easy user experience to help to enhance productivity.	
1.1.9	The solution must allow users to track phone calls, letters, email messages, tasks, and other information relating to customers in one place so that the users can work more productively.	
1.1.10	The solution must track and manage correspondences simply and seamlessly by evaluating the incoming messages and automatically matching them with appropriate conversation.	
2	Contact Centre Management	
2.1	Contact Centre	
2.1.1	The proposed solution must have the ability to integrate with CTI and call center infrastructure using any of the mentioned industry standard interfaces (AGC/Nortel/CISCO/Aspect). They need to be TAPI compliant.	
2.1.2	The solution must be able to launch into the correct application screens when choosing a work item from the queue.	

2.1.3	Work items should be distributed to the agents based on configurable assignment rules.	
2.1.4	The solution must be able to provide a 360-degree view of the caller based on the information in the CRM data model. This view should include contact information, account information, service request history, activities, tasks, escalations etc.	
2.1.5	The solution must be able to view complete interaction history of caller's previous interaction history.	
2.1.6	The agents must be able to receive incoming emails via their personal work queue.	
2.1.7	The solution must be able to automatically send an acknowledgement for an incoming email.	
2.1.8	The solution must be able to create a case based on an issue from an inbound email.	
2.1.9	The solution must be able to create response templates.	
2.1.10	The solution must be able to monitor agent and email queues.	
2.1.11	The solution must provide the monitoring for the transactions and necessary reporting based on agreed SLA.	
2.1.12	The solution must have the ability to Integrate with CTI and call center infrastructure.	
2.1.13	The contact center executive should have access to call scripts which will guide the agent through the calls and should support branching logic	
2.2	360 degree Customer View	
2.2.1	The CRM application should be integrated to all LOB applications used for the current products delivered by Star Union Dai-ichi Life Insurance.	
2.2.2	The CRM application should be capable of integrating to all LOB applications like core insurance system, content management system and other web applications to provide the agents with 360° view of customer Information.	
2.2.3	The application should be configured to fetch / load all customer / account and transaction information from different application based on client id/contract/application number.	
2.2.4	The application should be configured to load the current in-house applications based on products.	
2.2.5	The application should be configured to improve the up-selling and/or cross-selling, which are right now time consuming since agents need to go to different applications / website for speedy promotions	
2.2.6	The application should be integrated to other applications for single customer view like: Content Management system	

	Core Insurance system	
2.2.7	The application should implement single customer view by accessing the latest data from applications.	
2.3	Agent Enablement	
2.3.1	The application should be configured to increase the productivity of call center agents by providing features like single sign on and automation reducing need to re - key information.	
2.3.2	The application should be configured to allow agents to login into all LOB applications automatically without re-keying username/password into these applications	
2.3.3	The application should be configured to automate the manual processes for certain activities like Product Catalogue Marketing Event Campaign Info	
2.3.4	The application should be configured to support automatic screen population via CTI (Computer Telephony Integration) and/or IVR.	
2.3.5	The application must be configured to support more than one active session for a call center user so as to support more than one concurrent customer at a given time during escalation.	
2.3.6	The solution should be configured to implement workflows to remove the need for agents to remember which applications to look into for different kinds of information.	
2.3.7	The solution should be integrated with knowledge management system to help quickly resolve frequently-occurring issues	
2.3.8	The solution should be configured to load all the pertinent information about a customer into context and share it with all the integrated applications to reduce re-keying.	
2.4	Business Rules	
2.4.1	The implementation should include business logic definition required for providing single customer care view.	
2.4.2	The implementation shall enable business rules to be easily changed.	
2.4.3	The solution implementation of business logic must be independent of any existing application logic, so that in the future if that application is to be phased out, it should be smooth transition.	

2.5	Track KPI's / Reporting / Logging / Audit Trail	
2.5.1	The solution should be configured to provide audit trail facility to track the agent's activities on cases logged.	
2.5.2	The application should be configured to track response time for handling customer calls / queries	
2.5.3	The application should be configured to gather and analyze data related to handling of customer issues, to help determine future customer care strategies	
	The application should be configured to provide the standardized template response to certain typical queries / requests.	
2.6	Security	
2.6.1	The application should be configured such that the access to the customer information must support user level authentication and access rights	
2.6.2	The application should be configured to enforce role-based access based on users, groups, roles, etc. The application should be configured to setup users, groups, roles, and their permissions.	
2.6.3	The application should be configured to manage and provide access control to different applications so that not all users should be able to access all the applications	
2.6.4	The application should be implemented to delegate some additional functionality at the user level, e.g.: change password functionality should be given to user.	
2.6.5	The application should be configured in such that the same screens and system function shall be available to Agents, customer representatives etc, but with role-based access in place (i.e. a person can only access modules for which they have permission).	
2.6.6	The application should be configured to be deployed as a secured, managed desktop, allowing agents access to only the programs they are allowed to use.	
3	Case management	
3.1.1	The solution must be able to create and manage cases to capture caller issues.	
3.1.2	Each case has to be attached to a caller's profile stored in the CRM data model	
3.1.3	The solution must be able to automatically assign a case to an owner based on configurable assignment rules	
3.1.4	The solution must be able to create different kinds of case types.	

3.1.5	The solution must be able to track the progress of a case from open till closure.	
3.1.6	The solution must be able to search for duplicate cases and link the duplicate service.	
3.1.7	The solution must be able to create multiple tasks under a case.	
3.1.8	Each task must be able to be assigned to different people automatically based on configurable assignment rules	
3.1.9	Each task must be able to be tracked from open till closure.	
3.1.10	The solution must be able to create task templates which consist of multiple pre-configured tasks	
3.1.11	The solution must be able to notify the assignees of tasks of the task assignment via notification messages	
3.1.12	The solution must be able to send the notification messages via email	
3.1.13	The solution must be able to send the notification messages to external parties as well via email	
3.1.14	The solution shall provide a workflow engine or work-routing capabilities.	
3.1.15	The solution must be able to set escalation rules to escalate tasks if the tasks are not closed within specified criteria.	
3.1.16	The solution shall automatically alert or notify after certain threshold have been met.	
3.1.17	Workflow rules must be easily configurable by end users based on business rules and natural language and should not require support from IT developers.	
3.1.18	The solution must be equipped with an embedded knowledge base to provide agents with resolutions to common issues	
3.1.19	The knowledge must be able to keep the information in a structured and categorical manner	
3.1.20	The knowledge base must be equipped with a search engine that can search for relevant information based on key word search.	
3.1.21	Ability to have workflows processes to ensure the solution in the knowledge based are audited and approved by relevant parties before it can be posted for usage	
3.1.22	The solution must be able to attach helpful information from the knowledge base to a case	
3.1.23	The solution must be able to flag if the information found in the knowledge base was helpful in solving a case	

3.1.24	The solution shall provide a calendar management and scheduling engine for supporting service activities.	
3.1.25	Call center agents should be able to assign and dispatch field service engineers based on their skills and availability.	
3.1.26	The solution must show the availability in a view of a service calendar showing a dashboard of field engineers and their calendar.	
3.1.27	The solution must be able to show schedule conflicts when an appointment is scheduled.	
3.1.28	The solution must allow the agent to easily reschedule if there is any conflict.	
3.1.29	The solution must enable the feedback mechanism through survey process used to capture feedback from customers (internal and external) in order to measure the customer satisfaction index	
3.1.30	The solution must provide an easy to use GUI based tool to build questionnaires to capture feedback	
3.1.31	The GUI based tool must be able to support question types such as free text, pull down, check boxes, etc.	
3.1.32	The responses capture in the feedback management application must be automatically attached and stored to a customer profile in the customer data model	
3.1.33	Feedback Management through various smart sources viz: SMS, Email, Telephone based through calling should also be tagged in a case	
3.1.34	The solution must permit the definition of a flexible workflow to drive the case resolution process.	
3.1.35	The solution should provide out of the box reports based on industry standard platforms.	
3.1.36	The solution must provide the ability to reopen a case manually or in an automated fashion within a specified time window.	
3.1.37	The solution must be able to automatically thread together multiple email responses for the same service case.	
3.1.38	The solution must be able to support definition of rich text templates for outbound communication.	
3.1.39	The solution must be able to involve employees or external partners in the resolution process outside the CRM.	
3.1.40	The agent should be able to generate statements in the PDF form of policy holdings and other standardized customer documents.	
3.1.41	The agent should be able to dispatch these directly via email from the corresponding service request to resolve the case.	

3.1.42	The users should be able to personalize their dashboards further based on their own preferences.	
3.1.43	The proposed solution must have the ability to integrate with IGMS as per IRDA guidelines in batch & real time mode.	
4	Marketing	
4.1	Campaign Creation	
4.1.1	Create campaigns including details such as campaign type, campaign status, offer, expected response, proposed start and end date, actual start and end date	
4.1.2	Capture campaign financials details such as costs and expected revenue	
4.1.3	Associate target product to campaign	
4.1.4	Associate sales literature such as product brochures to campaigns	
4.1.5	Associate target marketing list of prospects and customers to campaign	
4.1.6	Capture campaign planning tasks and able to assign tasks to specific individuals for follow up and track completion	
4.1.7	Support workflow based approval to route planned campaign to management for approval	
4.1.8	Associate campaign with other related campaigns	
4.1.9	Save campaign as a template which can be reused and easily modified to create similar campaigns	
4.1.10	Support quick campaigns with wizard interface for easy creation by individual users to create quick campaigns for their own customers	
4.1.11	Support create of the campaign in a drag & drop interface	
4.1.12	Implement permission based marketing with opt outs & controlled lists	
4.1.13	Blend multi-channel campaigns into a unified campaign flow based on marketing objectives	
4.1.14	Support response based branching & scoring controlling the marketing campaign flow	
4.1.15	Support the use of historical campaign data in future campaigns	
4.1.16	Support the management of events, road shows & other physical campaigns	
4.1.17	Support the usage of social media in launching campaigns with the ability to integrate with the top social networking channels	

4.2	Target Marketing List	
4.2.1	Easily define target list using query tool which supports natural language to select desired criteria of customer base	
4.2.2	Review and refine query to achieve desired target list	
4.2.3	Saved target list can be associated with multiple different campaigns	
4.2.4	For externally acquired list, support data import for list of prospect data to be associated with relevant campaign	
4.2.5	Support data cleansing to define simple rules for duplicate detection	
4.2.6	Support multiple types of target lists	
4.2.7	Create segments based on activities of past marketing campaigns	
4.2.8	Create segments based on past responses of prospects	
4.2.9	Create control groups within segments	
4.3	Campaign Execution	
4.3.1	Campaigns can be executed over multiple channels, such as phone, letter, email, fax, advertising and appointments for sales users to follow up or even road show events.	
4.3.2	Templates are created and mail merged with customer information from target marketing list	
4.3.3	Campaign activities for various channels are generated upon campaign execution	
4.3.4	Mail merged items (letters, emails) are associated as activities to the target prospect/customer record.	
4.3.5	Phone call activities are generated for the relevant target lists and assigned to contact center agents for making the calls.	
4.3.6	Appointment activities are generated for the relevant target lists and assigned to sales users for follow up.	
4.3.7	Support definition of rules to exclude customers who have been touched in the past X days.	
4.3.8	Support adherence to customer's communication and privacy preferences. If customers indicate preferences such as Do not call or Do not send Bulk Email, the customer will be excluded from campaign execution even though he/she is in the	

	target marketing list.	
4.4	Campaign Responses	
4.4.1	Campaign responses are tracked for users to capture prospect/customer's response if they are interested or not interested in the offer.	
4.4.2	Campaign responses can be automatically converted into a lead or opportunity and associated with the relevant customer record.	
4.4.3	For conversion of lead, information of account, contact and opportunity can be automatically brought over and associated with customer records or new record can be created for prospects.	
4.4.4	For disqualified leads, status can be updated accordingly.	
4.5	Reporting	
4.5.1	Campaign Performance analysis and reporting including details such as activity completion, types of responses, responses over various channels, campaign ROI of costs versus revenue.	
5	Enterprise Portal Integration	
5.1.1	The proposed solution must provide integration capabilities to JBoss using web services	
5.1.2	The proposed solution must be integrated with enterprise portal to enable portal search to find CRM data and entities, as well as documents, e-mail messages and Web sites.	
5.1.3	The proposed solution must enable end users to view and edit CRM data through the enterprise portal without having to switch to another application.	
5.1.4	The CRM data which can be viewed and edited within the enterprise portal can include standard entities such as accounts, contacts, opportunities and cases but must also include all data in custom entities created.	
5.1.5	The proposed solution must provide consistent security policies between CRM and the enterprise portal to ensure that only people with appropriate permissions are allowed to view or edit CRM data.	
6	Mobility	
6.1	Offline client	

6.1.1	The proposed solution must be able to support offline mode.	
6.1.2	The proposed solution must be able to support all or selected CRM functionality on the offline client.	
6.1.3	The access of CRM data on the offline client must be controlled by the CRM system and provides access and relevant data to authorized individuals only.	
6.1.4	The proposed solution must ensure security of CRM data in offline mode with encryption, authentication, and authorization technologies.	
6.1.5	The proposed solution must ensure users see only the data they need with role-based data access and encryption for offline data.	
6.1.6	The proposed solution must include tools or configuration options to manage information available in offline client.	
6.1.7	The proposed solution must ensure configuration management of offline functionality based on metadata.	
7.2	Mobile Support	
7.2.1	The proposed solution must provide CRM data and functionality to your mobile workforce anywhere through browser enabled mobile devices.	
7.2.2	The proposed solution must enable mobile users to not only view CRM data but also with online update capability.	
7.2.3	The CRM functionality on the mobile interface must be familiar and easy to use.	
7.2.4	The CRM functionality on the mobile interface must include capabilities such as:	
7.2.5	<ul style="list-style-type: none"> • Assign tasks 	
	<ul style="list-style-type: none"> • Easily manage and enter account information 	
	<ul style="list-style-type: none"> • Add and organize contacts 	
	<ul style="list-style-type: none"> • Schedule meetings 	
	<ul style="list-style-type: none"> • Transmit meeting notes or details at the point of contact 	
	<ul style="list-style-type: none"> • Assign follow up activities 	
	<ul style="list-style-type: none"> • Track existing or new opportunities 	
	<ul style="list-style-type: none"> • Request approvals 	
	<ul style="list-style-type: none"> • Gain access to mobile e-mail and collaborative Web-based workspaces for sharing ideas and information. 	

7.2.6	The mobile device access of CRM data must be controlled by the CRM system and provides access and relevant data to authorized individuals only.	
7.2.7	The proposed solution must ensure security of CRM data on mobile with encryption, authentication, and authorization technologies.	
7.2.8	The proposed solution must ensure users see only the data they need with role-based data access.	
7.2.9	The proposed solution must include tools or configuration options to manage information presented on mobile devices.	
7.2.10	The proposed solution must ensure configuration management of mobile functionality based on metadata.	
7.2.11	The mobile user interface must be browser independent.	
8	Reporting and Analytics	
8.1	Reporting	
8.1.1	The business intelligence capabilities must cut across all modules in the CRM application with integrated reporting and analytics.	
8.1.2	The proposed solution must provide an integrated reporting tool for new reports to be created as required.	
8.1.3	The proposed solution must have comprehensive reports for various activities in CRM.	
8.1.4	Additional reports or changes to existing reports must be easily created by end users and should not require major effort from IT department.	
8.1.5	Reports must have restricted access based on user responsibility.	
8.1.6	The ad-hoc reporting tool must enable reports to be exported to other formats like Excel and PDF format.	
8.2	Analytics	
8.2.1	The proposed solution must provide CRM analytic capabilities that provide complete scenario analysis to measure the effectiveness of current activities and generate performance details.	
8.2.2	The proposed business intelligence must provide a set of pre-built dashboards which can be easily configured to meet specific requirements.	

8.2.3	Pre-built dashboards should include key operational metrics for executive, sales, service and marketing.	
8.2.4	Example of prebuilt dashboard such as Sales dashboard should include sales performance, tracking actual revenue against target, tracking sales achievement against quota for each sales person, tracking list of top performers, pipeline funnel report.	
8.2.5	The integrated business intelligence analysis and dashboards must have restricted access based on user responsibility.	
8.2.6	The proposed business intelligence must be able to drill down from the summary level to the transaction level details.	
8.2.7	The proposed solution must be capable of incorporating KPIs which can be assessed during appraisal and can be monitored and tracked by authorized users enterprise-wide.	
8.2.8	The proposed solution must provide these KPIs monitoring in scorecards formats with advanced controls such as traffic light, gauge and meters to track achievement status.	
9	Architecture	
9.1	The Application should be implemented as a SOA compliant architecture.	
9.2	The Application implementation should be in such a way that integration between various Line Of Business (LOB) applications must not create another interim physical database for storing or processing any transactions or data except maintaining the state of the information as per the business logic.	
9.3	The application should be built on a Industry standard technology platform.	
9.4	The application should provide technical tools to configure & customize the technical features of the product.	
9.5	The application should be based on an object model framework with technical features to review & configure each layer of the framework.	
9.6	All objects involved in the delivery of the solution should be managed through a unified technical tool set.	
9.7	The platform should enable the extension of the application to create new objects and link the same with existing objects within the unified tool	
9.8	The technical tool should support creation of all elements of the application through a user interface approach.	
9.9	Configuration of user interface forms, tables, business rules, dashboards & searches	

	should be possible in the technical tool.	
9.10	User interface design should cover addition of fields, controls, tabs & grouping into flexible sets of functions on each form.	
9.11	The platform should support end user personalization of key elements such as dashboards, column orders & searches.	
9.12	The reporting platform used in the solution should leverage industry standard products which support basic & advanced reporting features.	
9.1.3	The reporting platform should be able to generate reports LOB Wise, Client wise, customer segment wise etc	

Part B – Technical Specifications

Sr. No	Requirement	Response	Remarks / Comments
1	Technical Requirements		
1.1	Operating system for servers should be any of the following: - Windows NT - Windows 2000 -Sun Solaris -AIX		
1.2	RDBMS should be any of the following: - Oracle - MS SQL		
1.3	Client software for system users should be browser based or smart client based supporting Microsoft Internet Explorer/Mozilla Firefox/Google Chrome		
1.4	Should provide for: - Scalability/Clustering (Workflow/Rule Engine servers) - Fail Over		
1.5	Which application server platforms does the vendor certify?		
1.6	Does the system provide APIs for interoperability of the product with other systems?		
1.7	What facilities does the product provide to integrate with middleware environments?		
1.8	Which external BPM and workflow products does the product integrate with and are certified by the vendor?		
1.9	Should be able to inter-operate with other back-office systems		
1.10	The system should have a robust BCP architecture whereby no data loss should occur in case of a failure.		
2	System Administration & Security		
2.1	Should provide a UI for System Administration		
2.2	Should provide for remote server administration		
2.3	Should support LDAP, NIS, MS Active Directory for user management		
2.4	Should support single sign-on		
2.5	Should encrypt user passwords		
2.6	Should support archival which is automated (scheduled) by administrators		
2.7	Should maintain audit trail		
2.8	Should maintain log for all transactions/changes		
2.9	Please provides details about level of security provided in the application		

2.10	Restricted read/write(create/update) access to menus based on user profiles		
2.11	Should facilitate defining security (read, write, delete, edit) at multiple levels e.g. User, Role / Group, Menu, Menu Item, Form/Page, Field, etc.		
2.12	Should maintain error log		
2.13	Should maintain unique error codes		
2.14	Complete and comprehensive security from unauthorized access and misuse should be available along with necessary audit trail detailing every user's activity.		
2.15	Password policies should be configurable in the application.		
2.16	Passwords should be stored in the database in an encrypted format.		
2.17	Should support Single Sign-on.		
2.18	System must provide Maker/Checker facility for critical modules		
2.19	System must support many levels of users levels of users		
2.20	System must provide for data confidentiality/integrity		
2.21	The system should be available in active mode in Primary data centre & passive mode in disaster recovery site		

Part C – Other Criteria

1. The respondent should have minimum 2 installations in the Indian Insurance market compliant to IRDA regulations.
2. The respondent should have at least 5 live installations in the BFSI arena in India.
3. The project implementation should be completed within 90 days including customizations if any.

Part D - Vendor Details to include

1 Client Base

- 1.1 Total number of completed (live) installations in Life Insurance Segment in India?
- 1.2 Total number of completed installations with the current version in BFSI segment?
- 1.3 Current number of installations in progress
- 1.4 Average number of users per installation?
- 1.5 How many new customers signed up during the previous year?
- 1.6 Any customer shifted from your CRM solution to another CRM solution in the last three years?

2. Company Information, Support and Development

- 2.1 Total number of employees?
- 2.2 Total number of office locations (domestic to corporate office)?
- 2.3 Total number of office location (world-wide)?
- 2.4 Year company was established
- 2.5 What is the ratio of technical support staff to the number of installations?
- 2.6 What percentage of the vendor's total staff is engaged in technical support?
- 2.7 What percentage of the user base has full maintenance contracts?
- 2.8 How many technical staff is engaged in development of the system?
- 2.9 What percentage of the vendor's total staff is engaged in technical development?
- 2.10 What type of user interface is available on the system (e.g. is the system web-enabled)?
- 2.11 Project plan/ methodology.
- 2.12 Overall timelines suggested.
- 2.13 Resource availability for project implementation and ongoing support.
- 2.14 Support Centers (preferably, Mumbai based).
- 2.15 Implementation & post production support by vendor or 3rd party.

3. Location / Presence

- 3.1 User locations
- 3.2 Does the system have installations in the African-continent?
- 3.3 What is the BCP setup of the vendor/supplier?

4. Revenue

- 4.1 Please provide the most recent fiscal year revenues.
- 4.2 Previous year revenues.
- 4.3 One year growth percentage.
- 4.4 Five year growth percentage.
- 4.5 Amount allocated to R&D most recent fiscal year.
- 4.6 Amount allocated to R&D previous fiscal year.

Part E – Weightage

Following is the weightage that will be given to the points in this section

Criteria	Weightage
Functional and technical specifications	70%
Client base	20%
Company information/location and revenue	10%

SECTION 3 - INSTRUCTIONS TO VENDORS

Cost of Bidding

The Bidder shall bear all costs associated with the preparation and submission of its Bid, and Star Union Dai-ichi Life Insurance will in no case be responsible or liable for these costs, regardless of the conduct or outcome of the Bidding process.

Submission of Proposals (Methodology)

The Proposal shall be submitted in two separate envelopes – Part I covering the Technical, and Masked Commercial (except software price and AMC/Maintenance charges) and Qualification aspects hereinafter referred to as “**Technical Proposal**” and Part II covering only the price schedules hereinafter referred to as the “**Price Proposal**”. The two parts in separate envelopes should be enclosed in one covering envelope super scribed with the name of the Project “**Proposal for Customer Relationship Management Solution**”

Documents comprising the Technical Proposal Envelope, should:

- (a) Comply with the TCC (Section 4)
- (b) Comply with the Technical Specifications of each item (Section 2)
- (c) Provide details of with respect to the Service and Support details (Section 2)
- (d) Be accompanied by duly filled in Proposal Form (FORM-1). The form must be duly signed by the vendor.
- (e) Masked price – Form 3 (containing all the information except the prices)

Any Technical Proposal not containing the above will be rejected.

Any Technical Proposal containing any price information will be rejected.

Price Proposal Envelope should be accompanied by duly filled in Proposal Forms **(FORM 2) AND (FORM 3)**. The vendor must duly sign the forms.

The vendors shall seal the “**Technical Proposal**” and “**Price Proposal**” separately, encloses them in a covering envelope and the same shall:

- (i) be addressed to SUD at the address given; and
- (ii) bear the Name “**Proposal for Customer Relationship Management Solution**”

Proposals must be received by SUD at the address specified, not later than the date and time specified in Request for Proposal.

SECTION 4 - TERMS AND CONDITIONS OF CONTRACT (TCC)

1. Definitions

1.1. In this Contract, the following terms shall be interpreted as indicated:

- (a) "The Goods" means all of the equipment, software, and/or other materials, which the Supplier is required to supply to SUD;
- (b) "SUD" means the Star Union Dai-ichi Life Insurance Company Ltd.
- (c) "The Services" means those services ancillary to the supply of the Goods, such as transportation and insurance, and any other incidental services, such as installation, commissioning, provision of technical assistance, training and other such obligations of the Supplier covered under the Purchase Contract;
- (d) "TCC" means the Terms and Conditions of Contract contained in this section;
- (e) "The Supplier" or "the Vendor" means the individual or firm supplying or intending to supply the Goods and Services under this Contract; and
- (f) "The Project Site" means corporate office/Head Office/various administrative offices of SUD.

2. Country of Origin

- (i) All goods and related services to be supplied under the Contract shall have their origin in eligible source countries, as per the prevailing Import Trade Control Regulations in India.
- (ii) For purposes of this clause, "origin" means the place where the goods are produced, or the place from which the related services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized product results that is substantially different in basic characteristics or in purpose or utility from its components.

3. Standards

- (i) The Goods supplied under this Contract shall conform to the standards mentioned in the Technical Specifications, and, when no applicable standard is mentioned, to the authoritative standards appropriate to the Goods' country of origin. Such standards shall be the latest issued by the institution concerned.

4. Use of Contract Documents and Information

- (i) The Supplier shall not, without SUD's prior written consent, disclose the Contract, or any provision thereof, or any specification, plan, drawing, pattern, sample or information furnished by or on behalf of SUD in connection therewith, to any person other than a person employed by the Supplier in the performance of the Contract. Disclosure to any such employed person shall be made in confidence and shall extend only as far as may be necessary for purposes of such performance.

- (ii) The Supplier shall not, without SUD's prior written consent, make use of any document or information enumerated in this document except for purposes of performing the Contract.
- (iii) Any document, other than the Contract itself, shall remain the property of SUD and shall be returned (in all copies) to SUD on completion of the Supplier's performance under the Contract, if so required by SUD.

5. Patent Rights

- (i) The Supplier shall indemnify SUD against all third-party claims of infringement of license agreement, patent, trademark, or industrial design, intellectual property or copy rights etc. arising from use of the Goods or any part thereof in India.
- (ii) The Supplier must own the Patent Rights if any and/or the intellectual property rights with regards to the software provided. If the supplier does not own, the supplier must have the written consent of the owner of the said patent/intellectual rights holder.

6. Performance Security

- (i) Within 7 days of the award of Purchase order, the Supplier shall furnish to SUD, the Performance Security for an amount equivalent of 10% of License and implementation amount valid up to 1 Year after the schedule date of completion of Delivery period. Provided that SUD may, having regard to the value and/or nature of the goods of the purchase contract and, at its sole discretion, waive the performance guarantee.
- (ii) SUD shall be at liberty to set off/adjust the proceeds of the performance security towards the loss, if any, sustained due to the supplier's failure to complete its obligations under the contract. This is without prejudice to SUD's right to proceed against the Supplier in the event of the security being not enough to fully cover the loss/damage.
- (iii) The Performance Security shall be denominated in Indian Rupees and shall be in one of the following forms: (a) a bank guarantee issued by a reputable bank in India, acceptable to SUD, in the form provided in Bid Form and Other Formats; or (b) a Banker's Cheque / Demand Draft. favoring "Star Union Dai-ichi Life Insurance Company Ltd. "
- (iv) In the event of any contract amendment, the Supplier shall, within 7 days of receipt of such amendment, furnish the amendment to the Performance Security, rendering the same valid for the duration of the Contract, as amended for further period of 90 days thereafter. In the event of any correction of defects or replacement of defective software during the warranty period, the warranty for the corrected / replaced software shall be extended to a further period of 12 months. The performance guarantee for a proportionate value shall be extended by 60 days over and above the extended warranty period.
- (v) The Supplier will maintain a 99% uptime of the software application.

7. Inspection and Quality Control Tests

- (i) SUD will test the implementation after completion of the installation and commissioning at the site of the installation (for site preparation, the Supplier should furnish all details to SUD sufficiently in advance so as to get the works completed before receipt of the software). Complete equipment and software should be supplied, installed and commissioned properly by the Supplier prior to commencement of performance tests;
- (ii) The acceptance test will be conducted by SUD / SUD's Consultants or any other person nominated by SUD, at its option. The acceptance will involve trouble-free operation for a period to be decided by SUD, but not exceeding 15 consecutive days. SUD reserves the right to increase the said days by informing the supplier in writing. There shall not be any additional charges for carrying out acceptance tests. No bugs in the software should occur if any are found the supplier will resolve/fix the same without any extra cost. All the software should be complete and no missing modules / sections will be allowed. The Supplier shall maintain necessary log in respect of the results of the tests to establish to the entire satisfaction of SUD, the successful completion of the test specified. An average uptime efficiency of 98% for the duration of test period shall be considered as satisfactory;
- (iii) Provided that SUD may, at its discretion, require the Supplier to devise and conduct the acceptance test, at his own cost, in the presence of SUD's representative(s) to establish to the satisfaction of SUD that the configuration/performance of the goods supplied are in conformity with the specifications laid down in the purchase contract.
- (iv) In the event of the equipment and software failing to pass the acceptance test, a period not exceeding two weeks will be given to rectify the defects and clear the acceptance test, failing which, SUD reserves the right to get the equipment/Software replaced by the Supplier at no extra cost to SUD.
- (v) Successful conduct and conclusion of the acceptance tests for the installed goods and equipment shall also be the sole responsibility and at the cost of the Supplier.
- (vi) Should any inspected or tested software fail to conform to the Specifications, SUD may reject the Goods/Software, and the Supplier shall either replace the rejected Goods/Software or make alterations necessary to meet specification requirements, free of cost, to SUD.
- (vii) Nothing stated hereinabove shall in any way release the Supplier from any warranty or other obligations under this Contract.

7.1 Manuals/Drawings and Documentation

- (i) Before the goods and equipment are taken over by SUD, the Supplier shall supply operation and maintenance manuals together with drawings, wherever applicable, of the goods. The manuals and drawings shall be in English.
- (ii) Unless and otherwise agreed, the goods and equipment shall not be considered to be completed for the purpose of taking over, until such manuals and drawings have been supplied to SUD.

7.2 For the System & Other Software, the following will apply:

The Supplier shall provide complete and legal documentation of equipment, all subsystems, operating systems, compiler, system software and the other software. The Supplier shall also provide licensed software for all software products, whether developed by it or acquired from others. The Supplier shall also indemnify SUD against any levies/penalties on account of any default in this regard.

7.3 Acceptance Certificates:

- (i) On successful completion of acceptability test, receipt of deliverables, etc., and after SUD is satisfied with the working on the system, the acceptance certificate signed by the Supplier and the representative of SUD will be issued. The date on which such certificate is signed (unless otherwise provided for) shall be deemed to be the date of successful commissioning of the systems.

Training shall be conducted on the dates mutually agreed up on and within two months from the date of acceptance of supply.

8. Delivery and Documents

8.1 Delivery of the Goods shall be made by the Supplier **within 3 weeks from the date of purchase Order**. The following documents are required

- (i) 2 copies of Supplier's invoice showing contract number, goods description, quantity, and unit price and total amount;
- (ii) Delivery note or acknowledgement of receipt of goods from the Consignee or in case of goods from abroad, original and two copies of the negotiable, clean, on-board bill of lading marked freight prepaid and two copies of non-negotiable bill of lading;
- (iii) Packing list identifying contents of each package;

The above documents shall be received by SUD before arrival of Goods (except where it is handed over to the Consignee with all documents) and, if not received, the Supplier will be responsible for any consequent expenses.

9. Insurance

9.1 The insurance shall be in an amount equal to 100 percent of the value of the Goods from "Warehouse to final destination" on "All Risks" valid for a period not less than 1 month after installation and commissioning and issue of acceptance certificate by SUD.

Should any loss or damage occur, the Supplier shall –

- (a) Initiate and pursue claim till settlement, and
- (b) Promptly make arrangements for repair and/or replacement of any damaged item/s irrespective of settlement of claim by the underwriters.

10. Transportation

10.1 Where the Supplier is required under the Contract to transport the Goods to a specified place of destination within India, transport to such place of destination in India, including insurance and storage, as shall be specified in the Contract, shall be arranged by the Supplier, and the related costs shall be included in the Contract Price.

11. Incidental Services

11.1 The incidental services to be provided are as under:

- (a) Performance of on-site assembly and start-up of the supplied desktops/laptops, operating system and other software packages;
- (b) Furnishing of appropriate equipment, device drivers, system design and programming services required for development and/or maintenance of the supplied Goods; Even if the equipment is initially purchased for use with particular Operating System(s), SUD may, at any future date, use the equipment with any other operating system and in such cases, the Supplier shall provide the device drivers required for the equipment components in order for them to function satisfactorily in the new operating environment. In the event of such device drivers not being available, the Supplier should substitute the equipment component with another with comparable performance and having device driver software for the proposed operating system.
- (c) Furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods and equipment;
- (d) Maintenance, repair and software updates of the supplied Goods for a period of five years including warranty period, provided, that this service shall not relieve the Supplier of any Warranty obligations under this Contract; and
- (e) Training of SUD's personnel at the Supplier's office or other facility, in the installation and operation of the desktops/laptops, utilities and all contracted software, as specified in TCC Clause 6.

12. User Training

12.1 The supplier will provide the necessary user training required for proper usage of the software to the employees and required personnel of SUD.

13. Warranty

13.1 The Supplier will provide warranty for the software for a minimum period of 12 months of actual Go-Live Date of the solution in SUD.

13.2 The Supplier should also confirm that any of the original software and its components or any customizations to the same as per SUD requirement must be free of any defects/bugs. The Supplier further warrants that all Goods supplied under this Contract shall have no defect, arising from design, materials or workmanship or from any act or omission of the Supplier that may

- develop under normal use of the supplied Goods in the conditions prevailing in India. If any such is attributed to the supplier then the same should be rectified by the vendor and corrective measures to fix the issue should be done by supplier free of cost to SUD.
- 13.3 The supplier will maintain a specific SLA for the resolution of any issues that arise in the normal course of usage of the software. The supplier must not violate the said SLA.
- 13.4 The warranty period shall be minimum 12 months from date of acceptance of the software. If, for reasons attributable to the Supplier, these guarantees are not attained in whole or in part, the Supplier shall, make such changes, modifications, and/or additions to the Goods or any part thereof as may be necessary in order to attain the contractual guarantees specified in the Contract at its own cost and expense and to carry out further performance tests in accordance with TCC Clause 6.
- 13.5 SUD shall promptly notify the Supplier in writing of any claims arising under this warranty.
- 13.6 Upon receipt of such notice, the Supplier shall, with all reasonable speed, in any case not later than the TAT agreed upon, repair or replace the defective goods or parts thereof, without cost to SUD.
- 13.7 If the Supplier having been notified, fails to remedy the defect(s) within the agreed TAT from the of receipt of such notice , SUD may proceed to take such remedial action as may be necessary, at the Supplier's risk and expense and without prejudice to any other rights which SUD may have against the Supplier under the Contract.

14 Maintenance Service:

- 14.1 Free on-site maintenance services shall be provided by the Supplier during the period of warranty. The vendor will enter into AMC/Maintenance agreement with SUD after the expiry of the warranty period of software for such a period that support of vendor is available for a period of 5 years including warranty period. SUD may at its discretion enter into AMC / Maintenance contract with the supplier. The AMC/Maintenance charges should be quoted separately in the commercial bid.
- 14.2 There are many regulatory authorities that come up with new changes to the AML/IRDA rules. As such these changes must be done free of cost under the maintenance agreement
- 14.3 If and when the supplier updates its software to fix some product level bugs or incorporates any functionality as per regulatory and business changes the same should be provided to SUD free of cost.
- 14.4 All maintenance operations will be carried out by the supplier as per the SLA defined.
- 14.5 Free on-site support and bug fixing, if any detected, for initial 12 months after GO Live.
- 14.6 It is expected that the average downtime of an item will be less than half the maximum downtime (i.e. defined as number of days for which an item of equipment is not usable because of inability of the Supplier to repair it). In case an item is not usable beyond the stipulated maximum

downtime the Supplier will be required to arrange for an immediate replacement of the same till it is repaired. Failure to arrange for the immediate repair / replacement will be liable for penalty of Rs.500/- per day per item. The amount of penalty will be recovered from the balance payable amount for goods supplied, during warranty and/or annual maintenance charges and/or by lodging a claim against the Supplier, as the case may be. In the event of Balance Payable amount not sufficient to set off the liability of the Supplier under this head SUD shall be at liberty to proceed against the Supplier for recovery of the balance as may be advised.

15. Payment Schedule

Payment shall be made in Indian Rupees, in the following manner:

Sr. No	Milestone	Percentage
1	Delivery of Licenses	20%
2	Delivery of the Solution in UAT environment in SUD	40%
3	Go Live of Customer Relationship Management Solution	30%
4.	End of Warranty Support	10%

16. Prices

Prices payable to the Supplier as stated in the Contract shall be firm and not subject to adjustment during performance of the Contract, irrespective of reasons whatsoever, including exchange rate fluctuations, changes in taxes, duties, levies, charges etc.

17. Change Orders

17.1 SUD may, at any time, by a written order given to the Supplier, make changes within the general scope of the Contract in any one or more of the following:

- (a) Specifications;
- (b) The place of installation/usage
- (c) The Services to be provided by the Supplier.

17.2 If any such change causes an increase or decrease in the cost of, or the time required for the Supplier's performance of any provisions under the Contract, an equitable adjustment shall be made in the Contract Price or delivery schedule, or both, and the Contract shall accordingly be amended. Any claims by the Supplier for adjustment under this clause must be asserted within 7 days from the date of Supplier's receipt of SUD's changed order.

18. Delays in the Supplier's Performance

18.1 Delivery of the Software and performance of Services shall be made by the Supplier in accordance with the time schedule prescribed by SUD.

18.2 If at any time during performance of the Contract, the Supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the software and performance of Services, the Supplier shall promptly notify SUD in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the Supplier's notice, SUD shall evaluate the situation and may, at its discretion, extend the Suppliers' time for performance, with or without liquidated damages, in which case, the extension shall be ratified by the parties by amendment of the Contract.

18.3 Except as provided in the above clause, a delay by the Supplier in the performance of its delivery obligations shall render the Supplier liable to the imposition of liquidated damages, unless an extension of time is agreed upon without the application of liquidated damages.

19. Liquidated Damages

19.1 If the Supplier fails to deliver any or all of the Goods/Software or perform the Services within the time period(s) specified in the Contract, SUD shall, without prejudice to its other remedies under the Contract, deduct from the Contract Price, as liquidated damages, a sum equivalent to 1.00 percent per week or part thereof of contract price subject to maximum deduction of 10% of the delivered price of the delayed Goods or unperformed services for each week or part thereof of delay, until actual delivery or performance. Once the maximum is reached, SUD may consider termination of the Contract.

20. Taxes and Duties

20.1 The Supplier will be entirely responsible for all applicable taxes, duties, levies, charges, license fees, road permits, etc. in connection with delivery of products/equipments at site including incidental services and commissioning. However Sales Tax / VAT will be paid extra. Payment of Octroi, entry-tax, alone, if applicable, will be made at actual, on production of suitable evidence of payment by the Supplier.

20.2 Tax deduction at Source: Wherever the laws and regulations require deduction of such taxes at the source of payment, SUD shall effect such deductions from the payment due to the Supplier. The remittance of amounts so deducted and issuance of certificate for such deductions shall be made by SUD as per the laws and regulations in force. Nothing in the Contract shall relieve the Supplier from his responsibility to pay any tax that may be levied in India on income and profits made by the Supplier in respect of this contract.

21. Supplier Integrity:

21.1 The Supplier is responsible for and obliged to conduct all contracted activities in accordance with the contract using state-of-the-art methods and economic principles and exercising all means available to achieve the performance specified in the Contract.

22. Equipment & System Software Maintenance:

The Supplier will accomplish preventive and breakdown maintenance activities to ensure that all software modules execute without defect or interruption for at least 98% uptime for 24 hours a day, 7 days a week of operation of the machine, worked on a quarterly basis. If any critical component of the entire

configuration is out of service for more than a day, the Supplier shall either repair the defective unit within 24 hours or immediately replace the defective unit or replace the same immediately at its own cost.

23. Award Criteria

The SUD will award the Contract to the successful Bidder, out of the Bidders who have responded to SUD's Invitation for Quotation, who has been determined to qualify to perform the Contract satisfactorily, and whose Bid has been determined to be substantially responsive, and is the lowest evaluated Bid.

24. Repeat Orders

After a Purchase Contract is awarded to a Supplier, SUD may, at his discretion, award further Purchase Contracts to the same Supplier for all/some of the goods originally quoted by him at the same/reduced prices up to a period of one year from the date of the first Purchase Contract without calling for fresh quotations

24. SUD's Right to Reject Any or All Bids

SUD reserves the right to accept or reject any Bid, and to annul the Bidding process and reject all Bids at any time, without thereby incurring any liability to the affected Bidder or Bidders or any obligation to inform the affected Bidder or Bidders of the grounds for SUD's action.

SECTION 5 - TECHNO - COMMERCIAL SCORING

The commercial bid of the technically shortlisted bidders will be opened and the bidders will be ranked as L1, L2, L3, etc on the basis of their prices offered (final offered price will be calculated on the basis of weighted average of prices for various items mentioned in BOM).

There would be a weight-age of 70% to the Technical score and 30% for the Commercial price. The maximum marks (Total score) for Technical and Commercial proposals would be 100. It would be normalized as under for each bidder:-

$$\text{Total Score} = 0.7 \times T(s) + 0.3 \times F(s)$$

Where;

$$F(s) = (LP / BP) \times 100$$

Acronyms:

- T(s) stands for technical score out of 100 for the bidder.
- F(s) stands for percentage of a bidder's commercial price compared to the lowest quoted price among the bidders whose commercial bids are opened.
- BP stands for Bidder's price.
- LP stands for lowest price among all the bidders.

The proposals will be ranked in terms of Total Scores arrived at as above. The proposal with the highest Total Score will be considered first for award of contract and will be invited for price and contract negotiation.

The bidders are requested to note the following:

- (i) Strictly conforming to the specifications as mentioned in the Tender should be quoted.
- (ii) Total unit cost to SUD will be decided on the basis of unit cost of the Customer Relationship Management Solution and its Equipments inclusive of maintenance support for 3 years taken together.
- (iii) All standard (default) items / components and optional items / components, if any, should be separately and clearly mentioned. Detailed cost breakup should be furnished in the Price Schedule as per the format prescribed.
- (iv) Technical specifications of the software offered (against the requirements specified) as well as the Technical Details (in the prescribed format) should be furnished along with the Bid, for all the standard and optional items if any offered. Otherwise the offer would be treated as Non-responsive.
- (v) Detailed product brochures, catalogues, technical literature, system/reference manuals, instruction booklets and all supporting documentation (in English language) **specific to the**

solution and other optional/dependent components should be submitted along with the offer. Otherwise the offer would be treated as Non-responsive.

- (vi) Hard copies (in original) of as many – product brochures, catalogues, technical literature, system/reference manuals, instruction booklets, supporting documentation, installation and user manuals for all the components should be included in the offer.
- (vii) All software supplied should be legal and licensed and supplied on standard CD-ROM/DVD ROM media, with user documentation (English language versions).
- (viii) Any deviation from the specifications in the products offered should be separately brought out explicitly, in the column provided for this purpose.
- (ix) SUD reserves the right to accept or reject in part or full, any or all the offers without assigning any reasons thereof.

**PROPOSAL FORM (TECHNICAL PROPOSAL)
(To be kept in the Technical Proposal Envelope)**

Date:.....

To:

**The Chief Executive Officer,
Star Union Dai-ichi Life Insurance Company Limited
11th Floor, Raghuleela Arcade,
IT Park, Sector 30A,
Opp Vashi Rly Stn., Vashi
Navi Mumbai 400703**

Gentlemen,

Re: Request for Proposal for procurement of Customer Relationship Management Solution

Having examined the Proposal Documents, the receipt of which is hereby duly acknowledged, we, the undersigned, offer to supply and deliver Equipment/Software, in conformity with the said Proposal documents.

We undertake, if our Proposal is accepted, to deliver, install and commission the system in accordance with the delivery schedule specified in **clause 8.1 of Section 3.**

We agree to abide by the Proposal and the rates quoted therein.

Until a formal contract is prepared and executed, this Proposal, together with your written acceptance thereof and your notification of award, shall constitute a binding Contract between us.

We undertake that, in competing for (and, if the award is made to us, in executing) the above contract, we will strictly observe the laws against fraud and corruption in force in India namely "Prevention of Corruption Act 1988". We understand that you are not bound to accept the lowest or any Proposal you may receive.

Dated this day of 20.....

(signature)

(in the capacity of)

Duly authorized to sign Proposal for and on behalf of

**PROPOSAL FORM (PRICE PROPOSAL)
(To be kept in the Price Proposal Envelope)**

Date:

To:
**The Chief Executive Officer,
Star Union Dai-ichi Life Insurance Company Limited
11th Floor, Raghuleela Arcade,
IT Park, Sector 30A,
Opp Vashi Rly Stn., Vashi
Navi Mumbai 400703**

Gentlemen,

Re: Request for Proposal for procurement of Customer Relationship Management Solution

Having examined the Proposal Documents, the receipt of which is hereby duly acknowledged, we, the undersigned, offer to supply and deliver Equipment/Software, in conformity with the said Proposal documents for the sum of
..... (Total Proposal amount in words and figures) or such other sums as may be ascertained in accordance with the Schedule of Prices attached herewith and made part of this Proposal.

We undertake, if our Proposal is accepted, to deliver, install and commission the system in accordance with the delivery schedule specified in **clause 8.1 of Section 3**.

We agree to abide by the Proposal and the rates quoted therein for the orders awarded by SUD.

Until a formal contract is prepared and executed, this Proposal, together with your written acceptance thereof and your notification of award, shall constitute a binding Contract between us.

We undertake that, in competing for (and, if the award is made to us, in executing) the above contract, we will strictly observe the laws against fraud and corruption in force in India namely "Prevention of Corruption Act 1988".

We understand that you are not bound to accept the lowest or any Proposal you may receive.

Dated this day of 20....

(signature)
Duly authorized to sign Proposal for and on behalf of

(In the capacity of)

CONTRACT FORM

THIS AGREEMENT made the ____ day of _____ between Star Union Dai-ichi Life Insurance Company Ltd. (hereinafter called "the Purchaser") of the one part and _____ (*name of the supplier*) having its Registered Office at _____ (hereinafter called "the Supplier") of the other part: **WHEREAS** the Purchaser invited Bids for certain Goods and ancillary services viz. _____ (*brief description of Goods and ancillary services*) and has accepted a Bid by the Supplier for the supply of those goods and services at a sum of _____ (*Contract Price in words and figures*) (hereinafter called "the Contract Price"). **NOW THIS AGREEMENT WITNESSETH AS FOLLOWS:**

1. In this Agreement words and expressions shall have the same meaning as are respectively assigned to them in the Conditions of Contract referred to.
2. The following documents of bid no. **SUD/IT/CRM/001 dated 27/07/2011** shall be deemed to form and be read and construed as part of this Agreement, viz.:
 - (a) Price Schedule submitted by the Bidder;
 - (b) The Schedule of Requirements;
 - (c) The Technical Specifications;
 - (d) The Terms and Conditions of Contract;
 - (e) The Purchaser's Notification of Award.
3. In consideration of the payments to be made by the Purchaser to the Supplier as hereinafter mentioned, the Supplier hereby covenants with the Purchaser to provide the goods and services and to remedy defects therein, in conformity in all respects with the provisions of the Contract.
4. The Purchaser hereby covenants to pay the Supplier in consideration of the provision of the goods and services and the remedying of defects therein, the Contract Price or such other sum as may become payable under the provisions of the Contract at the times and in the manner prescribed by the Contract.
5. Neither party shall disclose the confidential information to a third party. The parties will, at all times, maintain confidentiality regarding the contents of this Agreement and proprietary information including any business, technical or financial information.

Brief are the components of the solution delivery, listed. Supplier must add/change if required to the below

Option 1

Description	Total Cost (Rs)
Core Modules Licensing Cost 0 to 100 Licenses 100 – 250 Licenses 250 – 500 Licenses 500 & above	
Implementation & project Management Charges - Base Module Implementation - Customization & Integration(Customization as per SUD Processes & integration with CTI, IVR, SUD portal & IRDA IGMS Portal)	
Annual Maintenance charges after completion of One Year Warranty Period - Year 1 - Year 2 - Year 3 - Year 4 - Year 5	
Total Cost	

Option 2

Description	Total Cost (Rs)
Enterprise wide licenses (unlimited users)	
Implementation & project Management Charges - Base Module Implementation - Customization & Integration(Customization as per SUD Processes & integration with CTI, IVR, SUD portal & IRDA IGMS Portal)	
Annual Maintenance charges after completion of Warranty Period - Year 1 - Year 2 - Year 3 - Year 4 - Year 5	
Total Cost	

A Brief Project Implantation plan with timelines should also be included in the same.

Note: -

- **Taxes: Exclusive as per applicable.**
- **Please mention all taxes whichever is applicable.**
- **Please mention where amount is to be paid in currency other than INR**

TOTAL VALUE: (Rs.) _____

DELIVERY SCHEDULE: As per purchase order.

IN WITNESS whereof the parties hereto have caused this Agreement to be executed in accordance with their respective laws the day and year first above written.

Signed, Sealed and Delivered by the

Said..... (For the Purchaser)

In the presence of

Signed, Sealed and Delivered by the said..... (For the Supplier)

In the presence of