

Replies to Prebid Queries for GEM/2023/B/3283751 dated 29/03/2023 for Selection of vendor for end to end implementation of comprehensive Customer Relationship Management (CRM) solution for 5 years

Sl. No.	Page No.	Section/ Annexure/ Appendix	RFP Clause	Sub-Clause/ Technical Specifications	Bidder's Query	Bank's Reply
1	1	GeM Bid Document	Date of Submission of bid		Request the extension on date of final submission to 10th of May 2023	Bidder to refer Corrigendum-2.
2	2	Section A - Bid Schedule & Abbreviations	1. Bid Schedule	8. Last Date, Time and Venue for Submission of Bids - 26/04/2023	Please provide at least 4 weeks (working day basis) time after publishing all the clarifications of queries to all the vendors to submit a robust proposal.	Bidder to refer Corrigendum-2.
3	2	Section A - Bid Schedule & Abbreviations	1. Bid Schedule	8. Last Date, Time and Venue for Submission of Bids - Response should be submitted in GeM portal and physical documents should be submitted at below mentioned address before due date/time	Please mention which are the documents need to be submitted as physical copies as part of Bid submission apart from soft copies that will be submitted through GeM portal.	Bidder to refer clause 13.1 of Section-D of the RFP.
4	4	GeM Bid Document	Buyer Added Bid Specific Terms and Conditions	2. Bidder financial standing: The bidder should not be under liquidation, court receivership or similar proceedings, should not be bankrupt. Bidder to upload undertaking to this effect with bid.	In Prequalification Criteria, the bidder will showcase the financial capability by submitting Financial Reports on positive networth & Annual turnover. Kindly clarify will this audited document suffice the requirement or the bidder still needs to upload a self declaration on Financial standing. Kindly confirm our understanding	Bidder has to submit declaration as per RFP clause.
5	10	Section B - Introduction	4. Objective	4.3. The bidder should provide the proposed CRM Solution on SaaS Model which should be implemented in comprehensive environment (Hybrid model)	The proposed CRM is a cloud/SaaS based model and has the benefit to host in Zoho's cloud, wherein the complete infrastructure, servers, app servers and database will be fully managed and owned by Zoho in secured Data Centers within India.	Bidder to comply with RFP terms and conditions.
6	10	Section B - Introduction	4. Objective	4.3. The bidder should provide the proposed CRM Solution on SaaS Model which should be implemented in comprehensive environment (Hybrid model)	<p>We find the following contradictions in the RFP in providing the CRM solution on SaaS Model:-</p> <p>1) RFP ask is for providing licenses on unlimited user based for perpetual enterprise model.</p> <p>2) Annexure -17 requires the bidder to quote for license and ATS fees for the solution on Capex model.</p> <p>3) Bank has segregated data residency between on-premise and public cloud but not segregated functionalities to be deployed on-premise and public cloud.</p> <p>If the Bank wants perpetual unlimited licenses, we suggest the Bank not to ask for the Solution on SaaS model.</p>	Bidder to refer Corrigendum-2.



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7	10	Section B - Introduction	4. Objective	4.3. The bidder should provide the proposed CRM Solution on SaaS Model which should be implemented in comprehensive environment (Hybrid model)	Request Bank to Elaborate on Hybrid Model? Is Bank Opne to consider Complete SaaS solution Hosted in Public OEM environment (DC)?	The PII data should be on premises. The application and permissable non critical data in encrypted format may be in cloud. This explanation should be read inconsonance with various clauses of RFP.
8	10	Section B - Introduction	4. Objective	4.3. The bidder should provide the proposed CRM Solution on SaaS Model which should be implemented in comprehensive environment (Hybrid model)	The SaaS offerings are managed end-to-end by the OEM, including updates, patches, etc. For this reason, we request Bank to allow the offerings to be delivered from the hosted ecosystem. Request to not mandate a Hybrid architecture otherwise Bank may risk the disqualification of many OEM's from Gartner leaders quadrant.	Bidder to comply with RFP terms and conditions.
9	11	Section B - Introduction	6. Participation methodology	6.1. In this RFP either the authorized bidder on behalf of the Principal/OEM/OSD or Principal/OEM/OSD itself can bid but both cannot bid simultaneously for the same item/product. If participated, the bids of Principal/OEM/OSD and the authorized bidder/s are liable for rejection.	In the RFP response we may have multiple partners bidding independently, hope that is permitted?	Bidder to comply with RFP terms and conditions.
10	11	Section B - Introduction	5. Requirement Details	5.3. The selected bidder should not increase the individual prices quoted in the Bill of Material of this RFP beyond 8% for AMC per annum, 10% for resources per annum and 15% for ATS/subscription & support per annum after initial contract period.		No query posted
11	11	Section B - Introduction	6. Participation methodology	6.1. In this RFP either the authorized bidder on behalf of the Principal/OEM/OSD or Principal/OEM/OSD itself can bid but both cannot bid simultaneously for the same item/product. If participated, the bids of Principal/OEM/OSD and the authorized bidder/s are liable for rejection.	Could the Bank confirm we as a Bidder can bid as a Consortium(of OEM/OSD/Principal and SI so as to meet Banks Requirements). As a single OEM may not have full solution for requirements asked.	Bidder to comply with RFP terms and conditions.



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12	11	Section B - Introduction	5. Requirement Details	5.2. The term of contract will be initially for a period of five (5) years. If the performance of the bidder during the contract period is satisfactory, then it can be continued further with annual review at the sole discretion of the bank.	Please confirm that the term of the contract will be 5 years from the date of contract signing	The term of 5 years contract for proposed solution starts from the date of acceptance of the proposed solution by the Bank.
13	11	Section B - Introduction	5. Requirement Details		Is this for Retails Banking or corporate Banking or Both?	All existing and new customers/ consumers of the Bank
14	11	Section B - Introduction	6. Participation methodology	6.4. In the event of the bidder being not able to perform the obligations as per the provisions of the contract, the OEM/OSD/principal should assume complete responsibility on behalf of the bidder for providing end-to-end solution i.e., technology, personnel, financial and any other infrastructure that would be required to meet intent of this RFP at no additional cost to the bank. To this effect bidder should provide a dealer/distributor certificate for the proposed solution as per Annexure-16.	End to end responsibility of the implementation and execution of the project remains with the SI as primary bidder. However, OEM must be responsible for the SLA of the subscribed services.	Bidder to comply with RFP terms and conditions.
15	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.3. Bidder has to supply the standardize version of Comprehensive Customer Relationship Management Solution within Six (6) weeks from the date of acceptance of the order.	How strict are these timelines? Does it mean the scoping and phased approach should be basis these timelines?	Bidder to comply with RFP terms and conditions.
16	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.4. The remaining requirements should be customized and complete the User Acceptance Test (UAT) and Pilot Run within Six (6) weeks from the date of delivery of standardized solution.	How strict are these timelines? Does it mean the scoping and phased approach should be basis these timelines?	Bidder to comply with RFP terms and conditions.
17	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.5. Bidder has to complete Full project implementation/documentation/training and Go-Live within four (4) weeks from the date of User Acceptance Test and Pilot Run.	How strict are these timelines? Does it mean the scoping and phased approach should be basis these timelines?	Bidder to comply with RFP terms and conditions.



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18	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.2. The selected bidder should supply, install, integrate and implement the proposed comprehensive CRM solution as per RFP within Sixteen (16) weeks from the date of acceptance of the Purchase Order.	The time schedule purely depends on reviewing the existing eco system of Canara Bank and based on the discovery phase. The timelines will be quantified, reviewed and mutually agreed by both parties	Bidder to comply with RFP terms and conditions.
19	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.3. Bidder has to supply the standardize version of Comprehensive Customer Relationship Management Solution within Six (6) weeks from the date of acceptance of the order.	The time schedule purely depends on reviewing the existing eco system of Canara Bank and based on the discovery phase. The timelines will be quantified, reviewed and mutually agreed by both parties	Bidder to comply with RFP terms and conditions.
20	13	Section C - Deliverable and Service Level Agreements	2. Integration & Interfaces	2.1. The selected bidder has to work with different application vendors in order to integrate new solution to the existing workload or new workloads during contract period.	THE proposed CRM provides the capability to integrate with other application via REST API and the availability of REST API support by the different application vendors is critical for integration.  Please let know if all the applications to be integrated support REST API?	Bidder to comply with RFP terms and conditions. Bidder to integrate with feasible mode acceptable to the Bank.
21	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation		As the requirements provided by the Bank are complex. Can the bidder recommend best practice multi Phase implementation Time Line which we follow with all our Global Digital transformation Projects in BFSI. Spread across 8 to 10 months multi phase deployment, that would allow solution to set it and easy change Management in the bank as well.	Bidder to comply with RFP terms and conditions.
22	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.4. The remaining requirements should be customized and complete the User Acceptance Test (UAT) and Pilot Run within Six (6) weeks from the date of delivery of standardized solution.	Could the Bank let us know the plan for Pilot Phase. How many users or Branch's would need to live in Pilot. How long the Pilot would be , before rollout of the application to other Branches and Departments(call center , Retail Sales etc.)	Bidder to comply with RFP terms and conditions. Details will be shared with the selected Bidder.
23	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.4. The remaining requirements should be customized and complete the User Acceptance Test (UAT) and Pilot Run within Six (6) weeks from the date of delivery of standardized solution.	Could the Bank confirm that they would be responsible for rollout of application to other Branch's and offices. Bidder will be providing warranty support post initial Go Live.	Bidder to comply with RFP terms and conditions. Bidder is solely responsible for complete implementation of the proposed solution as per RFP terms.



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24	13	Section C - Deliverable and Service Level Agreements	2. Integration & Interfaces	2.1. The selected bidder has to work with different application vendors in order to integrate new solution to the existing workload or new workloads during contract period.	Could the bank provide us an Inventory List of All Applications that need to be integrated with CRM Solution.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected Bidder.
25	13	Section C - Deliverable and Service Level Agreements	2. Integration & Interfaces	2.1. The selected bidder has to work with different application vendors in order to integrate new solution to the existing workload or new workloads during contract period.	As the Proposed solution would be a CRM SAAS Solution. Could the bank also confirm that all integration with Banks existing System will be through Banks API Gateway for real time integrations.	Bidder to comply with RFP terms and conditions. Bidder to integrate with feasible mode acceptable to the Bank.
26	13	Section C - Deliverable and Service Level Agreements	2. Integration & Interfaces	2.1. The selected bidder has to work with different application vendors in order to integrate new solution to the existing workload or new workloads during contract period.	Do let us know whether the API gateway is operational, do share with us Make and Version.	At present, IBM API Connect is being used. Bank is in the process of implementing API Banking through RFP process. Please refer to API Banking RFP of the Bank.
27	13	Section C - Deliverable and Service Level Agreements	2. Integration & Interfaces	2.1. The selected bidder has to work with different application vendors in order to integrate new solution to the existing workload or new workloads during contract period.	As the Proposed solution would be a CRM SAAS Solution. Could the bank also confirm that all Batch integration with Banks existing System will be through Banks SFTP . Do confirm SFTP is operational	Bidder to comply with RFP terms and conditions. Bidder to integrate with feasible mode acceptable to the Bank.
28	13	Section C - Deliverable and Service Level Agreements	2. Integration & Interfaces	2.1. The selected bidder has to work with different application vendors in order to integrate new solution to the existing workload or new workloads during contract period.	As the Proposed solution would be a CRM SAAS Solution. Could the Bank confirm that they have Middleware available that could be used for Orchestrating Real Time Integrations between CRM System, Banks API Gateway and Banks Existing systems like Core Banking , LOS etc. Or can we propose an Middleware to help in easy of Integration between CRM and Banks API Gateway	Bidder to comply with RFP terms and conditions. Bidder has to integrate through Bank's API Gateway/ any other permissible mode, acceptable to the bank.
29	13	Section C - Deliverable and Service Level Agreements	2. Integration & Interfaces	2.1. The selected bidder has to work with different application vendors in order to integrate new solution to the existing workload or new workloads during contract period.	As the Proposed solution would be a CRM SAAS Solution. Could the Bank confirm that they have ETL available ,that the Bank would responsible and be using for all Batch Integrations for Extract , Transform and Load data from CRM >SFTP to existing Bank Systems and Vice Versa (Bank Existing Systems >Bank SFTP> CRM SAAS).	Bank shall provide API Gateway. All the relevant/required data to CRM will be exposed through API Gateway/ any other permissible mode, acceptable to the bank. The Bidder has to expose their API data for data flow from CRM solution to Bank's environment



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30	13	Section C - Deliverable and Service Level Agreements	2. Integration & Interfaces	2.1. The selected bidder has to work with different application vendors in order to integrate new solution to the existing workload or new workloads during contract period.	Could the Bank confirm that they the Bank would be responsible for all ETL work . Extract Transform and Load.	No
31	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.3. Bidder has to supply the standardize version of Comprehensive Customer Relationship Management Solution within Six (6) weeks from the date of acceptance of the order.	What would be the exit criteria of successful completion of this milestone ?	Bidder to comply with RFP terms and conditions.
32	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.2. The selected bidder should supply, install, integrate and implement the proposed comprehensive CRM solution as per RFP within Sixteen (16) weeks from the date of acceptance of the Purchase Order.	Typically the Enterprise wide implementation of the CRM in a Bank with the said modules takes more than 16 weeks. Can this be discussed with Bank based on our previous implementation experience and mutually agree up on the project Timelines?	Bidder to comply with RFP terms and conditions.
33	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.2. The selected bidder should supply, install, integrate and implement the proposed comprehensive CRM solution as per RFP within Sixteen (16) weeks from the date of acceptance of the Purchase Order.	Completing the implementation for the provided scope within 16 weeks looks very aggressive. Is Bank ready to consider any change in the implementation plan duration	Bidder to comply with RFP terms and conditions.
34	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.2. The selected bidder should supply, install, integrate and implement the proposed comprehensive CRM solution as per RFP within Sixteen (16) weeks from the date of acceptance of the Purchase Order.	Can the implementation modules be prioritized for planning the timelines? Is there any method of go-live thought through?	Bidder to comply with RFP terms and conditions.
35	13	Section C - Deliverable and Service Level Agreements	1. Supply, Installation, Integration & Implementation	1.3. Bidder has to supply the standardize version of Comprehensive Customer Relationship Management Solution within Six (6) weeks from the date of acceptance of the order.	Can the implementation modules be prioritized for planning the timelines? Is there any method of go-live thought through?	Bidder to comply with RFP terms and conditions.



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36	14	Section C - Deliverable and Service Level Agreements	5. Uptime	5.1. The selected bidder shall guarantee a 24x7x365 availability with monthly uptime of 99.90% for the solution as per Scope of Work (Annexure-8) and Technical and Functional requirements (Annexure-9), during contract period, which shall be calculated on monthly basis.	The standard uptime SLA provided by Salesforce is 99.70% which can be further discussed with the Bank after and if we are awarded the project.	Bidder to comply with RFP terms and conditions.
37	14	Section C - Deliverable and Service Level Agreements	5. Uptime	5.1. The selected bidder shall guarantee a 24x7x365 availability with monthly uptime of 99.90% for the solution as per Scope of Work (Annexure-8) and Technical and Functional requirements (Annexure-9), during contract period, which shall be calculated on monthly basis.	Since CRM application will not be a critical application, such high uptime requirement may not be required. Request bank to review the same and lower the uptime requirement to 99.7% or as provided by the OEM for On-Cloud solution. Penalties wrt. Uptime needs to be changed accordingly.	Bidder to comply with RFP terms and conditions.
38	14	Section C - Deliverable and Service Level Agreements	3. Security	3.2. The selected bidder will ensure the software delivered is in conformity with security standards and is without any security vulnerability.	The proposed solution is recommended to adhere with the existing ISO processes, security guidelines and compliance as defined by Zoho, as it serves millions of businesses across globe.  If Canara Bank has specific Security standards or other policies, it has to be shared with Zoho for review and then mutually agreed by both parties.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
39	14	Section C - Deliverable and Service Level Agreements	3. Security	3.3. The Bank may conduct security audit in the proposed solution after complete implementation.	Zoho will agree to allow access to Canara Bank or third party audits based on the following clauses: 1) The plan of audit shall be informed to Zoho before one month of audit. 2) The audit will only be aligned with ISO 27001 standards and limited with respect to application & process. 3) The frequency of audits will be limited to one per year. If there is any specific frequency of audits per Canara Bank's request, it will be reviewed by Zoho and will incur additional cost & effort to support the audits. 4) The audits to data centers is restricted due to security reasons.	Bidder to comply with RFP terms and conditions.



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40	14	Section C - Deliverable and Service Level Agreements	3. Security	3.8. The selected bidder is liable for not meeting the security standards or desired security aspects of all the ICT resources as per Bank's IT/Information Security / Cyber Security Policy.	The proposed solution is recommended to adhere with the existing ISO processes, security guidelines and compliance as defined by Zoho, as it servers millions of businesses across globe.  If Canara Bank has specific IT policy, Information Security or Cyber Security policies, it has to be shared with Zoho for review and then mutually agreed by both parties.	Bidder to comply with RFP terms and conditions.
41	14	Section C - Deliverable and Service Level Agreements	3. Security	3.3. The Bank may conduct security audit in the proposed solution after complete implementation.	As the Implementation in the RFP is for 16 Weeks. Could the bank confirm how many weeks the Bank would take to complete Security Audit.	Bank's security audit time is not included in the implementation period of the proposed solution.
42	14	Section C - Deliverable and Service Level Agreements	5. Uptime	5.1. The selected bidder shall guarantee a 24x7x365 availability with monthly uptime of 99.90% for the solution as per Scope of Work (Annexure-8) and Technical and Functional requirements (Annexure-9), during contract period, which shall be calculated on monthly basis.	Typically the OEM Manages the Uptime of the SaaS CRM as it is hosted in their Environment. In such case, Is it safe to assume that this clause is applicable to OEM rather than the SI?	Bidder to comply with RFP terms and conditions.
43	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	6.1. Penalties/Liquidated damages for delay in Delivery, Installation, Integration and Implementation of Solution would be as under:  6.1.1. Non-compliance of each sub clause from 1.3 to 1.5 will result in imposing penalty of 0.50% on delay per week or part thereof on the invoice cost of respective deliverables for each location/office. 6.1.2. However, the total Penalty/LD to be recovered under clause 6.1.1. shall be restricted to 10% of the invoice cost of respective deliverables for each location/office.	LD should be capped maximum to 3% of invoice cost of respective deliverables.	Bidder to comply with RFP terms and conditions.



44	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	<p>6.2. Penalties/liquidated damages for Onsite resources: In case the resource goes on leave/absent, replacements having equivalent or more experience and qualification has to be arranged by the selected bidder to ensure that regular functioning of the solution does not hamper. In case replacements are not arranged, Bank shall pay only the proportionate amount of resident resource charges during the particular quarter. The Bank shall also impose a penalty of 0.5% on the invoice of the quarterly Resident resource charges payable to the selected bidder for each week and part thereof of absence. However, total penalty under this clause will be limited to 20% on the invoice of the quarterly Resident resource charges payable to the selected bidder.</p>	Penalties/ LD should be capped maximum to 3% of invoice cost of respective deliverables.	Bidder to comply with RFP terms and conditions.
45	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	<p>6.1. Penalties/Liquidated damages for delay in Delivery, Installation, Integration and Implementation of Solution would be as under: 6.1.1. Non-compliance of each sub clause from 1.3 to 1.5 will result in imposing penalty of 0.50% on delay per week or part thereof on the invoice cost of respective deliverables for each location/office.</p>	Request change to 0.25% on delay per week	Bidder to comply with RFP terms and conditions.
46	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	<p>6.1. Penalties/Liquidated damages for delay in Delivery, Installation, Integration and Implementation of Solution would be as under: 6.1.2. However, the total Penalty/LD to be recovered under clause 6.1.1. shall be restricted to 10% of the invoice cost of respective deliverables for each location/office</p>	Request change to restricted to 5% of the invoice cost.	Bidder to comply with RFP terms and conditions.



47	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	6.2. Penalties/liquidated damages for Onsite resources: In case the resource goes on leave/absent, replacements having equivalent or more experience and qualification has to be arranged by the selected bidder to ensure that regular functioning of the solution does not hamper. In case replacements are not arranged, Bank shall pay only the proportionate amount of resident resource charges during the particular quarter. The Bank shall also impose a penalty of 0.5% on the invoice of the quarterly Resident resource charges payable to the selected bidder for each week and part thereof of absence. However, total penalty under this clause will be limited to 20% on the invoice of the quarterly Resident resource charges payable to the selected bidder.	Request Bank to limit the total penalty under this clause to 10% of invoice for resident resource charges. Also, let us know whether the onsite resources will be governed by the Holiday calendar of the bank and entitled for leaves as per Bank's policy.	Bidder to comply with RFP terms and conditions.
48	15	Section C - Deliverable and Service Level Agreements	5. Uptime	5.3. The selected bidder should consider high-availability (active-passive) at DC & DR with RPO of 15 minutes and RTO of 120 minutes.	The proposed CRM platform is a cloud/SaaS based solution and will be hosted in Zoho's secured data center. The hardware, software and infrastructure requirements will be fully owned & managed by Zoho.  The RTO is 60 minutes and the RPO is 30 minutes.	Bidder to comply with RFP terms and conditions.
49	15	Section C - Deliverable and Service Level Agreements	5. Uptime	5.5. The downtime calculated shall not include any failure due to bank, third party and Force Majeure.	The downtime may be due to factors that caters to networking, infrastructure, outages or software configuration issues. If the administrator or the users of Canara Bank has made any changes to the configuration that may impact the application functionality or access, it has to be analyzed, reviewed and agreed by both parties for the downtime calculation. The downtime caused specifically by administrators/users of Canara Bank should not be considered as downtime against the bidder.	Bidder to comply with RFP terms and conditions.
50	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages		Zoho does not directly adhere to the penalty clauses as we will share our Master Subscription Agreement which details the SLA, Terms & Conditions and other clauses for review of Canara Bank and will be mutually agreed.	Bidder to comply with RFP terms and conditions.



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51	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	<p>6.1. Penalties/Liquidated damages for delay in Delivery, Installation, Integration and Implementation of Solution would be as under:</p> <p>6.1.1. Non-compliance of each sub clause from 1.3 to 1.5 will result in imposing penalty of 0.50% on delay per week or part thereof on the invoice cost of respective deliverables for each location/office.</p> <p>6.1.2. However, the total Penalty/LD to be recovered under clause 6.1.1. shall be restricted to 10% of the invoice cost of respective deliverables for each location/office.</p>	<p>Could the bank confirm the Penalty would be 0.50% of Cost Of Implementation only excluding License cost, Warranty and AMC. We recommend to reword this clause as " 0.50% of Cost Of Implementation for that particular Phase only excluding all other Cost for Licensing , Warranty etc."</p>	Bidder to comply with RFP terms and conditions.
52	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	<p>6.1. Penalties/Liquidated damages for delay in Delivery, Installation, Integration and Implementation of Solution would be as under:</p> <p>6.1.1. Non-compliance of each sub clause from 1.3 to 1.5 will result in imposing penalty of 0.50% on delay per week or part thereof on the invoice cost of respective deliverables for each location/office.</p> <p>6.1.2. However, the total Penalty/LD to be recovered under clause 6.1.1. shall be restricted to 10% of the invoice cost of respective deliverables for each location/office.</p>	<p>Could the Bank please add the below Clause</p> <p>"The penalty will be applicable only if the delay is solely attributable to the Bidder"</p>	Bidder to comply with RFP terms and conditions.



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53	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	<p>6.2. Penalties/liquidated damages for Onsite resources: In case the resource goes on leave/absent, replacements having equivalent or more experience and qualification has to be arranged by the selected bidder to ensure that regular functioning of the solution does not hamper. In case replacements are not arranged, Bank shall pay only the proportionate amount of resident resource charges during the particular quarter. The Bank shall also impose a penalty of 0.5% on the invoice of the quarterly Resident resource charges payable to the selected bidder for each week and part thereof of absence. However, total penalty under this clause will be limited to 20% on the invoice of the quarterly Resident resource charges payable to the selected bidder.</p>	<p>Could the bank confirm "the Bank shall also impose a penalty of 0.5% on the invoice of the quarterly Resident resource charges payable to the selected bidder for each week and part thereof of absence" . 0.5% is on Invoice cost of the Individual Resource only excluding License and other costs for the period.</p>	<p>Bidder to comply with RFP terms and conditions.</p>
54	15	Section C - Deliverable and Service Level Agreements	5. Uptime	<p>5.5. The downtime calculated shall not include any failure due to bank, third party and Force Majeure.</p>	<p>Planned down time (if any) for any maintenance activity should also be excluded from downtime calculation?</p>	<p>Bidder to comply with RFP terms and conditions.</p>
55	15	Section C - Deliverable and Service Level Agreements	5. Uptime	<p>5.3. The selected bidder should consider high-availability (active-passive) at DC &amp; DR with RPO of 15 minutes and RTO of 120 minutes.</p>	<p>Typically these kinds of very aggressive RTO and RPO are usually not available in a Public SaaS Cloud model. We recommend Bank to accept the industry standards RPO/RTO (1 Hr RPO and 12 Hrs RTO) for SaaS applications.</p>	<p>Bidder to comply with RFP terms and conditions.</p>
56	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	<p>6.1. Penalties/Liquidated damages for delay in Delivery, Installation, Integration and Implementation of Solution would be as under: 6.1.1. Non-compliance of each sub clause from 1.3 to 1.5 will result in imposing penalty of 0.50% on delay per week or part thereof on the invoice cost of respective deliverables for each location/office.</p>	<p>Would request bank to reduce the penalty from 0.50 to 0.10% on per week instances</p>	<p>Bidder to comply with RFP terms and conditions.</p>



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57	15	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages		Please add to the clause: in LD "The Client shall not recover from the Consultant, in contract or tort, under statute or otherwise, any amount with respect to loss of profit, data or goodwill, or any other consequential, incidental, indirect, punitive or special damages in connection with claims arising out of this Agreement or otherwise relating to the Services, whether or not the likelihood of such loss or damage was contemplated." Also, request to revise/reduce the penalties %	Bidder to comply with RFP terms and conditions.
58	16	Section C - Deliverable and Service Level Agreements	6. Penalties/Liquidated Damages	6.3. Penalties/Liquidated damages for not maintaining uptime	Penalties should be capped maximum to 3% of invoice cost of respective deliverables.	Bidder to comply with RFP terms and conditions.
59	17	Section C - Deliverable and Service Level Agreements	7. Escrow arrangement	7.4. The cost of verification of the software payable to Escrow Agent and annual subscription fee shall be payable by the selected bidder. Bank shall not be liable to pay any amount to Escrow Agent taking from verification to its annual subscription to updation fee.	Escrow Agent should be discussed and agreed mutually as it is critical for us to deposit our source code. Plus, Escrow cost should be bear 100% by the Bank.	Bidder to refer Corrigendum-2.
60	17	Section C - Deliverable and Service Level Agreements	7. Escrow arrangement		How does the Escrow process work for Canara bank? Expectation from the same	Bidder to refer Corrigendum-2.



61	17	Section C - Deliverable and Service Level Agreements	7. Escrow arrangement		SAAS product covers warranty, indemnity and security of the product via MSA which will be signed with the bank. This will give assurity that the SAAS product purchased will not terminate the license agreement without financial repercussions. Also SAAS product comes with built in AMC with regular updates in each year to provide bank the latest features and functionalities as per the market need. SAAS product also has a differential layer where core platform is logically separated from Meta Layer (where SI configures the system as per bank's requirement) and MSA calls out that the Meta Layer where bank's configurations are done will be bank's IP. With the above details given, request the bank to relax the Escrow requirement as SAAS products cannot give access to source code, but the objective of the bank will be retained in the MSA as per the above method described	Bidder to refer Corrigendum-2.
62	17	Section C - Deliverable and Service Level Agreements	7. Escrow arrangement	7.6. The selected bidder shall provide complete and legal documentation of all subsystems, licensed operating systems, licensed system software, and licensed utility software and other licensed software. The selected bidder shall also provide licensed software for all software products whether developed by it or acquired from others. The selected bidder shall also indemnify the Bank against any levies / penalties on account of any default in this regard.	The proposed CRM platform is a cloud/SaaS based solution with the capability to host in Zoho secured data centers.  As Zoho is the OEM and owns the Intellectual Property Rights (IPR), we usually do not enter into ESCROW or share the source code. Please let know the process of Canara Bank for us to further review for contractual/legal obligations and mutually agree by both parties	Bidder to refer Corrigendum-2.
63	17	Section C - Deliverable and Service Level Agreements	7. Escrow arrangement		Source code for SaaS application is not shared via Escrow arrangement, request you to remove this clause for SaaS offering	Bidder to refer Corrigendum-2.
64	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	On-Cloud Solutions are generally subscription based and payment terms are annually in-advance. Request Bank to change: 100% of the subscription fee to be paid annually in advance.	Bidder to refer Corrigendum-2.



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65	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	Request bank to change to: 10% upon Project Kick-off 20% upon sign of SRS/BRD Document 20% upon Development Completion 25% upon UAT Sign Off 15% upon Go-Live 10% upon completion of hypercare phase of 2 weeks	Bidder to refer Corrigendum-2.
66	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	Any additional requirement or customization can be taken up as a Change Request and Request bank to change to the payment terms as: 25% upon sign of SRS/BRD Document 25% upon Development Completion 25% upon UAT Sign Off 25% upon Go-Live	Bidder to refer Corrigendum-2.
67	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	As we are proposing a Global CRM SAAS solution, the license metric would be based on Number of Users. Could we change this to " Comprehensive CRM Software solution based on relevant License Metric"	Bidder to refer Corrigendum-2.
68	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	As we are proposing a Global CRM SAAS solution, the license metric would be based on Number of Users. Could you please provide us the following information that would allow us to calculate the License Cost. Number of Users (Bankers/Relationship Managers/Call Center Agents etc.) - Number of users of Sales Solutions (lead & Opportunity Management ) - Number of DSA(Direct Sales Agents) - Number of users for using Social Platform - Number of users for using Collection Platform -Number of user for Using Service Solution - Number of Customer Records that would be used for Campaigns - Size of your Customer Data Base	Bidder to refer Corrigendum-2.
69	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	Could the bank change the Payment schedule for Payment Stages for Implementation Cost by Project Milestone Below- Based on Best Practices . - 10% Requirements Gathering - 20% Design Sign Off - 30% SIT Sign Off - 30% UAT Sign Off - 10% On Go Live - During Warranty Every 1 month Payout on Arrears	Bidder to refer Corrigendum-2.



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70	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	Could the bank change the Payment schedule for Payment Stages for Warranty - Every 1 month Payout on Arrears	Bidder to refer Corrigendum-2.
71	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	As the proposed solution is Cloud SAAS Solution , the licensing is based on Number of Users . Could the bank make the following changes " License Cost for X(e.g. 200) users payable monthly till Go Live". Post that license payable based on number of users expected to use the CRM system. Example 0 TO 8 Months - 200 Users (Implementation Time) 8 TO 10 Months - 1000 (200 + 800) Users - Rollout 11 to 15 Months - 5000 (1000+ 4000) users etc. 15 to 18 Months - 10000 + ( Complete Rollout).	Bidder to refer Corrigendum-2.
72	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	As the proposed solution is Cloud SAAS Solution , the licensing is based on Number of Users . Could the bank make the following changes " License Cost for X(e.g. 200) users payable monthly till Go Live". Post that license payable based on number of users expected to use the CRM system. Example 0 TO 8 Months - 200 Users (Implementation Time) 8 TO 10 Months - 1000 (200 + 800) Users - Rollout 11 to 15 Months - 5000 (1000+ 4000) users etc. 15 to 18 Months - 10000 + ( Complete Rollout).	Bidder to refer Corrigendum-2.
73	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	Request Bank to kindly elaborate. Generally the payment of Implementation is based on the milestones. Is it Ok if theBidder proposes the Payment milestones and will be mutually discussed and agreed?	Bidder to refer Corrigendum-2.
74	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	SaaS software licenses are given on subscription model based on number of users or quantity of services consumed and cannot be provided on unlimited basis, kindly provide the number of users with different roles (Sales User, Service User, Contact Center Users, Analytics User etc) for which license are required. Also please provide the volume of communication that you will be sending to your customer for marketing activities	Bidder to refer Corrigendum-2.



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75	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	In SaaS model, licenses are supplied on subscription model (not on perpetual model), this helps the Bank to save the capex cost.  Request you to change the payment terms as quarterly in arrears	Bidder to refer Corrigendum-2.
76	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	Please clarify unlimited users and enterprise licenses. Microsoft Business applications comes with user based subscription. License payment is made to the OEM monthly/yearly in advance	Bidder to refer Corrigendum-2.
77	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	Implementation payment will be based on the project milestones. It needs to be discussed	Bidder to refer Corrigendum-2.
78	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	Cloud hosting charges is the payment made to OEM, so LD clause and penalties not applicable for PwC. Please clarify.	Bidder to refer Corrigendum-2.
79	18	Section C - Deliverable and Service Level Agreements	8. Payment Terms	8.1. The payment schedule will be as under and will release after execution of contract agreement.	1. License: For all the users to have active licenses, 100% of the license fee needs to be paid before the go-live. 2. One time implementation: Request for exemption is the current clause and consider the payment in milestones wise like PO/SOW/Agreement Sign off and then BRD Sign off etc.	Bidder to refer Corrigendum-2.
80	19	Section C - Deliverable and Service Level Agreements	9. Warranty	9.2. The selected bidder has to provide comprehensive On-site warranty for Three (3) years for proposed Solution including Hardware, Software, OS, licenses etc.	For SaaS Solution, the warranty is generally as per the OEM warranty terms. Warranty of 3 years on proposed solution including hardware, software, OS licenses are generally practised in On-Premise solutions/Private Cloud. We request bank to consider participation from On-Cloud solution providers too.	Bidder to refer Corrigendum-2.
81	19	Section C - Deliverable and Service Level Agreements	9. Warranty		Zoho does not directly adhere to the Warranty clauses as we will share our Master Subscription Agreement which details the SLA, Terms & Conditions and other clauses for review of Canara Bank and will be mutually agreed.	Bidder to refer Corrigendum-2.
82	19	Section C - Deliverable and Service Level Agreements	9. Warranty	9.3. The warranty of proposed Solution including Hardware, Software, OS, licenses etc., will start from the date of acceptance of Solution	Request the Bank to consider warranty for Hardware, environmental software, OS, DB etc to be from the date of delivery and till the term of the contract i.e. 5 years from date of contract signing	Bidder to refer Corrigendum-2.



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83	19	Section C - Deliverable and Service Level Agreements	9. Warranty	9.2. The selected bidder has to provide comprehensive On-site warranty for Three (3) years for proposed Solution including Hardware, Software, OS, licenses etc.	Please clarify if same is applicable for on cloud solution as well.	Bidder to refer Corrigendum-2.
84	19	Section C - Deliverable and Service Level Agreements	9. Warranty	9.2. The selected bidder has to provide comprehensive On-site warranty for Three (3) years for proposed Solution including Hardware, Software, OS, licenses etc.	Is Bank expecting warranty of 3 years on the CRM Product only? OR is bank expecting warranty of 3 years on the CRM implementation / application configured for bank? Please confirm. Generally the warranty or Hypercare support for Implemented instance will be for 4 to 12 weeks after that the Production support team (Level 2 and Level 3) takes over the production support. IS bank expecting Production Support proposal also to be part of this RFP?	Bidder to refer Corrigendum-2.
85	19	Section C - Deliverable and Service Level Agreements	9. Warranty		Need clarification because this is a cloud based solution where no on-prem hardware is involved and Microsoft takes care of the maintenance of the cloud instances	Bidder to refer Corrigendum-2.
86	19	Section C - Deliverable and Service Level Agreements	9. Warranty	9.2. The selected bidder has to provide comprehensive On-site warranty for Three (3) years for proposed Solution including Hardware, Software, OS, licenses etc.		Bidder to refer Corrigendum-2.
87	19	Section C - Deliverable and Service Level Agreements	9. Warranty	9.3. The warranty of proposed Solution including Hardware, Software, OS, licenses etc., will start from the date of acceptance of Solution	Is Bank expecting support for 2 years after completion of 3 years warranty on the CRM Product only? OR is bank expecting support for 2 years on the CRM implementation / application configured for bank? Please confirm. Generally the Production support for Implemented instance will be done by Production support team (Level 2 and Level 3). IS bank expecting Production Support proposal also to be part of this RFP?	Bidder to refer Corrigendum-2.



88	20	Section C - Deliverable and Service Level Agreements	10. Annual Maintenance Contract (AMC) / Annual Technical Support (ATS)	<p>10.5. During the Warranty and AMC/ATS (if contracted) period, the Bidder should extend On Site Service and Support whenever and wherever required. The scope of Warranty and AMC (if contracted) shall include:</p> <p>10.5.1. Rectification of Bugs/defects if any</p> <p>10.5.2. Ensuring uptime of 99.90%</p> <p>10.5.3. Preventive Maintenance</p> <p>10.5.4. Maintenance of Hardware/Software/License supplied.</p>	<p>Could the Bank Confirm for the Warranty period the cost will include the OEM charges only for software (Covered by Licenses) only Page 118 Table A and B. And if the bank requires Onsite Resources , bidder will share a rate card that can be used.</p>	<p>Bidder to refer Corrigendum-2.</p>
89	20	Section C - Deliverable and Service Level Agreements	10. Annual Maintenance Contract (AMC) / Annual Technical Support (ATS)	<p>10.6. It may be noted that the Bank reserves the right to demand additional performance Bank Guarantee (as per Appendix-E) to the tune of 10% of the value of the Purchase Order, if AMC/ATS charges quoted by the selected bidder are abnormally low (i.e. AMC/ATS Cost percentage per annum should not be less than 5% of the cost of Hardware, software and License). The Bank has discretion to consider such offer or for seeking clarification from the selected bidder to decide for consideration. This Bank Guarantee will be towards contractual/AMC/ATS obligations of the selected bidder. The bidder shall quote the charges of AMC/ATS as per the Bill of Material (Annexure-17). This Bank guarantee shall be submitted within 15 days from the date of acceptance of the order which shall cover warranty and AMC/ATS period with a claim period</p>	<p>PBG should be capped maximum to 3% of the value to Purchase Order.</p>	<p>Bidder to refer Corrigendum-2.</p>
90	20	Section C - Deliverable and Service Level Agreements	10. Annual Maintenance Contract (AMC) / Annual Technical Support (ATS)	<p>10.3. Support for maintenance of solution (including Hardware, Software, OS and software license) supplied should be available for a minimum period of Two (2) years, covering all parts, maintenance and support, after expiry of warranty period.</p>	<p>We are assuming that only L2 and L3 support will be in scope of Warranty. We are assuming that L1 Helpdesk support will be provided by Bank</p>	<p>Bidder to refer Corrigendum-2.</p>



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91	20	Section C - Deliverable and Service Level Agreements	10. Annual Maintenance Contract (AMC) / Annual Technical Support (ATS)	10.1. At the time of submission of bids, the bidder has to quote AMC/ATS for Hardware (including OS), software, License Items for Two (2) years after completion of Three (3) years warranty period, in the commercial bid separately for comprehensive maintenance contract.	Need clarification because this is a cloud based solution where no on-prem hardware is involved and Microsoft takes care of the maintenance of the cloud instances	Bidder to refer Corrigendum-2.
92	20	Section C - Deliverable and Service Level Agreements	10. Annual Maintenance Contract (AMC) / Annual Technical Support (ATS)	10.1. At the time of submission of bids, the bidder has to quote AMC/ATS for Hardware (including OS), software, License Items for Two (2) years after completion of Three (3) years warranty period, in the commercial bid separately for comprehensive maintenance contract.		No query posted
93	21	Section C - Deliverable and Service Level Agreements	11. Scope involved during Contract period	11.6. Only licensed copies of software shall be supplied. The selected bidder shall grant an irrevocable perpetual license to the Bank to use the software. Further, all software supplied shall be of latest version.	The Bidder (Zoho) will grant Non-exclusive, revocable, non-transferable right and limited license to access, use license subject to certain restrictions applicable to the Bank's use of Software provided by Zoho.	Bidder to refer Corrigendum-2.
94	21	Section C - Deliverable and Service Level Agreements	12. Local support	12.1. The Support should be for an unlimited number of incidents reported to them and provides a practical solution to resolve the issue. The support should be provided over phone, E mail web based, in person, if required. All escalations will be attended / responded-promptly not later than 30 minutes of reporting.	The SLA and timelines for the support will be shared as part of the Master Subscription Agreement (MSA) which details the SLA, Terms & Conditions and other clauses for review of Canara Bank and will be mutually agreed.	Bidder to comply with RFP terms and conditions.
95	21	Section C - Deliverable and Service Level Agreements	11. Scope involved during Contract period		In SaaS model, licenses are supplied on subscription model (not on perpetual model), hence request you to please remove this clause	Bidder to refer Corrigendum-2.
96	21	Section C - Deliverable and Service Level Agreements	11. Scope involved during Contract period	11.1. The selected bidder should inform Bank about all release/version change of patches/ upgrades/ updates of software/ OS/ middleware etc. as and when released by the selected bidder/OSD.	Need clarification because this is a cloud based solution where no on-prem hardware is involved and Microsoft takes care of the maintenance of the cloud instances	Bidder to refer Corrigendum-2.



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97	21	Section C - Deliverable and Service Level Agreements	11. Scope involved during Contract period	11.2. If any software, license updates provided by the OSD as free of cost, it should be provided and installed & configured by the selected bidder free of cost to the Bank during Contract Period.	Need clarification because this is a cloud based solution where no on-prem hardware is involved and Microsoft takes care of the maintenance of the cloud instances	Bidder to refer Corrigendum-2.
98	21	Section C - Deliverable and Service Level Agreements	11. Scope involved during Contract period	11.3. Any corruption in the software/License/media shall be rectified during the full period of the contract, at no extra cost to the Bank.]	Need clarification because this is a cloud based solution where no on-prem hardware is involved and Microsoft takes care of the maintenance of the cloud instances	Bidder to refer Corrigendum-2.
99	21	Section C - Deliverable and Service Level Agreements	11. Scope involved during Contract period	11.4. The selected bidder shall make availability of spare parts/services, components etc. as and when required, and complete maintenance of the hardware/software/solution during Contract Period.	Need clarification because this is a cloud based solution where no on-prem hardware is involved and Microsoft takes care of the maintenance of the cloud instances	Bidder to refer Corrigendum-2.
100	21	Section C - Deliverable and Service Level Agreements	11. Scope involved during Contract period	11.6. Only licensed copies of software shall be supplied. The selected bidder shall grant an irrevocable perpetual license to the Bank to use the software. Further, all software supplied shall be of latest version.	Microsoft D365 is a cloud product.	Bidder to refer Corrigendum-2.
101	21	Section C - Deliverable and Service Level Agreements	11. Scope involved during Contract period	11.7. The selected bidder shall provide centralized complaint booking/lodging facility to the bank and the dash board shall be provided to the Bank. The method of booking complaints shall be E-mail, Toll-free no, on line portal, web, etc.	Can 3rd party systems such as Jira etc can be proposed?	Bidder to refer Corrigendum-2.
102	22	Section C - Deliverable and Service Level Agreements	12. Local support	12.3. The bidder will be responsible for attending complaints during all hours 24x7x365 basis of contract period.	The SLA and timelines for the support will be shared as part of the Master Subscription Agreement (MSA) which details the SLA, Terms & Conditions and other clauses for review of Canara Bank and will be mutually agreed.	Bidder to comply with RFP terms and conditions.



103	22	Section C - Deliverable and Service Level Agreements	17. Subcontracting	17.3. In case subcontracting is warranted in interest of the project, the selected bidder should take consent of the Bank before undertaking any such agreement. The selected bidder should further ensure subcontracting agreement is vetted by the Bank.	We assume that the resources can be from the bidder or the OEM. We also assume that with prior permission of the Bank the resources can be on the payroll of the Bank permitted sub-contracting partner	Bidder to comply with RFP terms and conditions.
104	22	Section C - Deliverable and Service Level Agreements	17. Subcontracting	17.1. Principle bidder only can participate and bidder should not sub-contract to any other company/firm/trust. After Selection process of the bidder and order placement, resources deployed should be employed with the selected bidder and they should be on the payroll of the selected bidder.	EY has done more then 100 BFSI CRM implementation and keen to participate in Canara Bank RFP. However, as an complience we do not resell the licenses and request to allow the sub-contracting in the interest of the project.	Bidder to comply with RFP terms and conditions.
105	22	Section C - Deliverable and Service Level Agreements	14. Software, Drivers and Manuals	The selected bidder shall supply along with each item all the related documents, Software Licenses loaded in the Hardware items without any additional cost. The documents shall be in English. These will include but not restricted to User Manual, Operation Manual, Other Software and Drivers etc.	Need clarification because this is a cloud based solution where no on-prem hardware is involved and Microsoft takes care of the maintenance of the cloud instances	Bidder to comply with RFP terms and conditions.
106	23	Section C - Deliverable and Service Level Agreements	18. Right to Audit		Zoho will agree to allow access to Canara Bank or third party audits based on the following clauses: 1) The plan of audit shall be informed to Zoho before one month of audit. 2) The audit will only be aligned with ISO 27001 standards and limited with respect to application & process. 3) The frequency of audits will be limited to one per year. If there is any specific frequency of audits per Canara Bank's request, it will be reviewed by Zoho and will incur additional cost & effort to support the audits. 4) The audits to data centers is restricted due to security reasons.	Bidder to comply with RFP terms and conditions.
107	26	Section D - Bid Process	5. Preparation of Bids	5.2. Part B - Commercial Bid	To submit the commercial bid as per the Bill of Material, Bank has to share the user type, their functions and count.	Bidder to comply with RFP terms and conditions.



108	33	Section E - Selection of Bidder	3. Evaluation of Bids	3.5. Bidders Presentation /Site Visits / Product Demonstration/POC 3.5.2. The Bank at its discretion call for providing of Proof of Concept (PoC) of proposed solution at the location which is identified by the Bank. Hence, Bidder is required to arrange the required software in prior and need to submit the pre-requisites document in order to complete the POC within 10 Days.	Is there confirmed plan for POC? Timelines would be very subjective to what is expected in the POC	Bidder to comply with RFP terms and conditions.
109	33	Section E - Selection of Bidder	3. Evaluation of Bids	3.5. Bidders Presentation /Site Visits / Product Demonstration/POC	Please provide the list of scenarios/use case that bank would like to see in product demo	Bidder to comply with RFP terms and conditions.
110	37	Section F - Ownership & Awarding of Contract	6. Effective Date	6.1. The effective date shall be date of acceptance of the order by the selected bidder. However, the bidder shall submit the acceptance of the order within seven days from the date of receipt of order.	The time schedule for signing contract purely depends on the understanding of existing eco system of Canara Bank and requirements. The timelines will be quantified, reviewed and mutually agreed by both parties	Bidder to comply with RFP terms and conditions.
111	37	Section F - Ownership & Awarding of Contract	7. Project Execution	The entire project needs to be completed expeditiously. The Bank and the selected bidder shall nominate a Project Manager each immediately on acceptance of the order, who shall be the single point of contact for the project at Bengaluru. However, for escalation purpose, details of other persons shall also be given. The project manager nominated by the bidder should have prior experience in implementing similar project. Project Kick-Off meeting should happen within 7 days from the date of acceptance of purchase order. The bidder shall submit a Weekly progress report to the Bank as per format, which will be made available to the selected bidder.	The time schedule for signing contract, project & program management purely depends on the understanding of existing eco system of Canara Bank, requirements and the governance set forth by Zoho and Canara Bank. The timelines will be quantified, reviewed and mutually agreed by both parties	Bidder to comply with RFP terms and conditions.



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112	39	Section F - Ownership & Awarding of Contract	12. Order Cancellation/Termination of Contract	12.3. Bank shall serve the notice of termination to the bidder at least 30 days prior, of its intention to terminate services without assigning any reasons.	Both parties should provide 90 days advance notice to each other for termination.	Bidder to comply with RFP terms and conditions.
113	45	Section G - General Conditions	14. Indemnity	14.2. The bidder shall indemnify, protect and save the Bank against all claims, losses, costs, damages, expenses, action suits and other proceedings, resulting from infringement of any law pertaining to patent, trademarks, copyrights etc. or such other statutory infringements in respect of Solution/Service supplied by them.	as a standard business and contracting policy EY does not undertake or accept any manner of indemnity obligation towards the client and is not acceptable from a GCO perspective and is not in line with EY's standard business and contracting policy	Bidder to comply with RFP terms and conditions.
114	46	Section G - General Conditions	15. Force Majeure		It is recommended to add below clause to under Force Majeure to facilitate remote working.  (i) To the extent that the provision of the Services is impacted by a pandemic (including COVID-19) and any reasonable concerns or measures taken to protect the health and safety interests of either Party's personnel, the Parties will work together to amend the Agreement to provide for the Services to be delivered in an appropriate manner, including any resulting modifications with respect to the timelines, location, or manner of the delivery of Services.  (ii) Where EY Personnel are required to be in present at Client's premises, EY will use reasonable efforts to provide the Services on-site at [Client] offices, provided that, in light of a pandemic the parties agree to cooperate to allow for remote working and/or an extended timeframe to the extent (i) any government or similar entity implements restrictions that may interfere with provision of onsite Services; (ii) either party implements voluntary limitations on travel or meetings that could interfere with provision	Bidder to comply with RFP terms and conditions.
115	52	Section H - Purchase Preference	3. Procurement through Local Suppliers (Make in India)		IS there a weightage for this in selection criteria?	Bidder to comply with RFP terms and conditions.



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116	56	Annexure 2 - Pre- Qualification Criteria		<p><u>2. Pre-Qualification Criteria:</u> The bidder (including OEM and OSD/OSO, if any) should either be Class-I or Class-II local supplier as defined in Public Procurement (Preference to Make in India) Revised Order (English) dated 16/09/2020.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> Certificate of local content to be submitted as per Annexure-5 as applicable.</p>	Request an exception to softwares offered as SaaS.	Bidder to comply with RFP terms and conditions
117	57	Annexure 2 - Pre- Qualification Criteria		<p><u>9. Pre-Qualification Criteria:</u> The bidder should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied solution is being used.</p>	<p>Could the Bank allow for customer references Globally instead of Just India. Request to make following Change from " in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP." to " in any organization in BFSI sector Globally within the last three years from the date of RFP."</p>	Bidder to refer Corrigendum-2.

118	57	Annexure 2 - Pre-Qualification Criteria		<p><u>9. Pre-Qualification Criteria:</u> The bidder should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied solution is being used.</p>	<p>Could the Bank remove the reference of "Purchase Order" in this clause as most times PO may be not be in Bidders name even thou have done the implementation. Also existing customer may not be happy with us sharing sensitive information like cost etc. in PO.</p>	<p>Bidder to refer Corrigendum-2.</p>
119	57	Annexure 2 - Pre-Qualification Criteria		<p><u>7. Pre-Qualification Criteria:</u> The bidder should have positive Net Worth as on 31/03/2022 and also should have not eroded by more than 30% in the last three financial years.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit certificate from the Company's Chartered Accountant with UDIN to this effect.</p>	<p>Can this (30%)be relaxed to higher percentage as many companies eroded during covid time .</p>	<p>Bidder to comply with RFP terms and conditions.</p>

120	57	Annexure 2 - Pre- Qualification Criteria		<p><u>9. Pre-Qualification Criteria:</u> The bidder should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied solution is being used.</p>	<p>We request Bank to modify the clause as under:</p> <p>The bidder/OEM should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p>	Bidder to refer Corrigendum-2.
121	57	Annexure 2 - Pre- Qualification Criteria		<p><u>9. Pre-Qualification Criteria:</u> The bidder should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied solution is being used.</p>	<p>Request the Bank to allow for the OEM reference to be acceptable against the criteria.</p> <p>We also suggest the document to be submitted should be purchase order / client reference letter duly mentioning that the supplied solution is being used</p>	Bidder to refer Corrigendum-2.

122	57	Annexure 2 - Pre- Qualification Criteria	<p>5. Pre-Qualification Criteria: Bidder should be the Original Equipment Manufacturer (OEM)/ Original Software Owner (OSO)/ Original Software Developer (OSD) of Solution.</p> <p>(OR)</p> <p>An authorized dealer/distributor of the proposed Solution.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> If the applicant is OSD/OSO, an Undertaking Letter has to submit in this effect. (OR) If the bidder is an authorized dealer/ distributor, an authorization letter from their OEM and OSO/ OSD to deal/market their product in India and it should be valid for entire contract period from the date of submission of</p>	<p>Please Clarify if MAF would suffice this clause from OEM being a system Integrator</p>	<p>OEM being an SI should submit undertaking/declaration as per Annexure-16</p>
123	57	Annexure 2 - Pre- Qualification Criteria	<p>6. Pre-Qualification Criteria: The bidder should have a minimum annual turnover of Rs.20 Crores during last 3 financial years (i.e. 2019-20, 2020-21 &amp; 2021-22) from Indian operations. This must be the individual company turnover and not of any group of companies.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> Bidder should submit Audited Balance Sheet copies for last 3 financial years i.e. 2019-20, 2020-21 and 2021-22 along with certificate from the Company's Chartered Accountant to this effect with Unique Document Identification Number.</p>	<p>Request you to Please provide exemption here for MSE or Startups with Rs. 18 CR for each year of last three financial years</p>	<p>The RFP Clause is modified as under: "6. Pre-Qualification Criteria: The bidder should have a minimum annual turnover of Rs.20 Crores (<u>MSE/ Startup - 15 Crores</u>) during last 3 financial years (i.e. 2019-20, 2020-21 &amp; 2021-22) from Indian operations. This must be the individual company turnover and not of any group of companies.</p> <p>Documents to be submitted In compliance with Pre-Qualification Criteria: Bidder should submit Audited Balance Sheet copies for last 3 financial years i.e. 2019-20, 2020-21 and 2021-22 along with certificate from the Company's Chartered Accountant to this effect with Unique Document Identification Number."</p>



124	57	Annexure 2 - Pre-Qualification Criteria		<p><u>9. Pre-Qualification Criteria:</u> The bidder should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied solution is being used.</p>	<p>Request you to Please provide Past Experience exemption for MSE and Startup registered Bidders</p>	<p>Bidder to refer Corrigendum-2.</p>
125	57	Annexure 2 - Pre-Qualification Criteria		<p><u>9. Pre-Qualification Criteria:</u> The bidder should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied solution is being used.</p>	<p>Request you to kindly relax this clause to- The bidder should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company/Public Sector globally within the last five years from the date of RFP.</p> <p>Also, as a documentary proof bidder self- declaration is acceptable</p>	<p>Bidder to refer Corrigendum-2.</p>



126	57	Annexure 2 - Pre-Qualification Criteria		<p><u>10. Pre-Qualification Criteria:</u> The bidder should have implemented and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company with minimum 500 branches in India as on RFP date.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase and reference letter for the solution duly mentioning the number of branches being used.</p>	<p>Request you to kindly relax this clause to- The bidder should have implemented and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/or listed company/Public Sector globally with minimum 500 branches.</p> <p>Also, as a documentary proof bidder self- declaration is acceptable</p>	Bidder to refer Corrigendum-2.
127	57	Annexure 2 - Pre-Qualification Criteria		<p><u>9. Pre-Qualification Criteria:</u> The bidder should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied solution is being used.</p>	<p>Request you to kindly reframe the criteria as " The bidder should have experience in implementing and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company in India within the last Five years from the date of RFP".</p>	Bidder to refer Corrigendum-2.



128	58	Annexure 2 - Pre-Qualification Criteria		<p><u>11. Pre-Qualification Criteria:</u> The proposed CRM solution should have been implemented and being used (not necessarily by the bidder) in any organization having customer base of minimum one crore (1,00,00,000) in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied CRM solution is being used and working satisfactorily to this effect.</p>	<p>Please clarify that OEM's implementation experience will suffice for this clause or it has to be bidder's experience.</p>	<p>Yes</p>
129	58	Annexure 2 - Pre-Qualification Criteria		<p><u>10. Pre-Qualification Criteria:</u> The bidder should have implemented and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company with minimum 500 branches in India as on RFP date.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase and reference letter for the solution duly mentioning the number of branches being used.</p>	<p>Could the bank remove/Relax this Clause "BFSI sector/ listed company with minimum 500 branches in India as on RFP date." , as there are NBFC and Fin Tech who have similar complex CRM requirements and may not be listed.</p>	<p>Bidder to refer Corrigendum-2.</p>



130	58	Annexure 2 - Pre-Qualification Criteria		<p><u>11. Pre-Qualification Criteria:</u> The proposed CRM solution should have been implemented and being used (not necessarily by the bidder) in any organization having customer base of minimum one crore (1,00,00,000) in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied CRM solution is being used and working satisfactorily to this effect.</p>	<p>Could the bank remove/relax this Clause "organization having customer base of minimum one crore (1,00,00,000)." to "organization having customer base of minimum one crore (20,000)." as there are NBFC and Fin Tech who have similar complex CRM requirements and may not be listed and 1 cr customers.</p>	<p>Bidder to comply with RFP terms and conditions.</p>
131	58	Annexure 2 - Pre-Qualification Criteria		<p><u>10. Pre-Qualification Criteria:</u> The bidder should have implemented and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company with minimum 500 branches in India as on RFP date.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase and reference letter for the solution duly mentioning the number of branches being used.</p>	<p>We request Bank to modify the clause as under:</p> <p>The bidder/OEM should have implemented and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company with minimum 500 branches in India as on RFP date.</p>	<p>Bidder to refer Corrigendum-2.</p>

132	58	Annexure 2 - Pre-Qualification Criteria		<p>12. <u>Pre-Qualification Criteria:</u> The bidder should have a valid ISO 9001:2015/ 27001:2013/ CMMI L3 certification as on RFP date.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit documentary evidence to this effect.</p>	<p>This project is having high level of complexity as it directly impacts the end customer of the Bank and image of the Bank. Hence this requires bidders who have certain level of maturity and understanding of handling complex project delivery and underlying processes.</p> <p>We request the Bank to have more stringent criteria by making CMMI level certification as mandatory requirement and also making it stricter by allowing only those bidders who are CMMI level 5 certified to participate in the bidding process to assure the Bank of safeguarding the risk of project delivery.</p> <p>Suggested modification in the clause:  The bidder should have a valid ISO 9001:2015/ 27001:2013 and CMMI L5 certification as on RFP date</p>	Bidder to comply with RFP terms and conditions.
133	58	Annexure 2 - Pre-Qualification Criteria		<p>10. <u>Pre-Qualification Criteria:</u> The bidder should have implemented and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company with minimum 500 branches in India as on RFP date.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase and reference letter for the solution duly mentioning the number of branches being used.</p>	Request you to Please provide Past Experience exemption for MSE and Startup registered Bidders	Bidder to refer Corrigendum-2.

134	58	Annexure 2 - Pre-Qualification Criteria		<p><u>11. Pre-Qualification Criteria:</u> The proposed CRM solution should have been implemented and being used (not necessarily by the bidder) in any organization having customer base of minimum one crore (1,00,00,000) in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied CRM solution is being used and working satisfactorily to this effect.</p>	Request you to Please provide Past Experience exemption for MSE and Startup registered Bidders	Bidder to comply with RFP terms and conditions.
135	58	Annexure 2 - Pre-Qualification Criteria		<p><u>11. Pre-Qualification Criteria:</u> The proposed CRM solution should have been implemented and being used (not necessarily by the bidder) in any organization having customer base of minimum one crore (1,00,00,000) in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied CRM solution is being used and working satisfactorily to this effect.</p>	<p>Request you to kindly relax this clause to -</p> <p>The OEM's CRM solution should have been implemented and being used (not necessarily by the bidder) in any organization having customer base of minimum 50 lakh+ in BFSI sector/ or listed company/Public Sector globally within the last five years from the date of RFP.</p> <p>Also, as a documentary proof bidder self- declaration is acceptable</p>	Bidder to comply with RFP terms and conditions.



136	58	Annexure 2 - Pre-Qualification Criteria		<p><u>10. Pre-Qualification Criteria:</u> The bidder should have implemented and maintaining any similar solution (Customer Relationship Management) in any organization in BFSI sector/ listed company with minimum 500 branches in India as on RFP date.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase and reference letter for the solution duly mentioning the number of branches being used.</p>	<p>For the list of branches, will it be acceptable if the bidder submit a self declaration letter stating the branch count along with official website URL/ RFP document pages. Kindly confirm will this comply the requirement</p>	<p>Bidder to refer Corrigendum-2.</p>
137	58	Annexure 2 - Pre-Qualification Criteria		<p><u>11. Pre-Qualification Criteria:</u> The proposed CRM solution should have been implemented and being used (not necessarily by the bidder) in any organization having customer base of minimum one crore (1,00,00,000) in BFSI sector/ listed company in India within the last three years from the date of RFP.</p> <p><u>Documents to be submitted In compliance with Pre-Qualification Criteria:</u> The bidder should submit purchase order and reference letter duly mentioning that the supplied CRM solution is being used and working satisfactorily to this effect.</p>	<p>For the customer base count, will it be acceptable if the bidder submit a self declaration letter stating the customer count. Kindly confirm will this comply the requirement</p>	<p>No. Bidder to comply with RFP terms and conditions.</p>



138	65	Annexure 8 - Scope of Work	<p>1. The selected bidder should provide the proposed CRM solution as per Functional &amp; Technical Requirements, Annexure-9 with all latest features as on the date of implementation. The CRM solution is mainly divided into 3 pillars:</p>	<p>1.1 Operational CRM 1.2. Analytical CRM 1.3. Collaborative CRM</p>	<p>What is the current CRM application? Is it On-premise or cloud or hybrid? What is the current Marketing application? Is it On-premise or cloud or hybrid? Volume of contacts, accounts, leads and active customers? what is the CBS system being used? How are Leads created? Can leads be created through Mobile App? How many / What are the different product lines? is Complaints / Grievances part of scope in CRM?</p>	<p>Currently, Bank is using ConnectQ CRM for call centre purpose. Bank is using Flexcube as CBS solution. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.</p>
139	65	Annexure 8 - Scope of Work	<p>3. Analytical CRM: This pillar consists of the analysis of data, improving the Bank's existing operations in a structured manner, providing predictive analysis and forecasting of data, integration of AI/ML, Analytics and Reporting etc</p>		<p>What is the Current Analytical system? Currently any predictive modeling used? Using which system? Is there any separate Reporting tool currently being used?</p>	<p>Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.</p>



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140	65	Annexure 8 - Scope of Work	<p>4. Collaborative CRM: This pillar shows how the data or processes are interacting with various applications, teams, processes, channels, etc. Social Media Management, Chatbot, Call Center Management, Campaign Management etc., comes under this module.</p>		<p>What are the different channels used currently?          What are the different social media channels in focus?          What CTI vendor used? Is call recording available for CRM? what is the CTI tool Version? Is IVR used?          Does bank have any customer portal? Should this be replaced?          Does bank have any Mobile App? Should this be integrated with Marketing / CRM applications?</p>	<p>Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.</p>
141	65	Annexure 8 - Scope of Work	<p>5. Standard Modules which shall be an integral part of the proposed CRM solution are:</p>	<p>5.1. Customer 360 View          5.2. Campaign management          5.3. Lead Module          5.4. Opportunity Management          5.5. Collection management          5.6. Social Media management          5.7. Dashboard &amp; Reports Management          5.8. Predictive Analysis &amp; Forecasting          5.9. User and workflow Management          5.10. Card management          5.11. Relationship Management          5.12. Call Centre Operations</p>	<p>1. Collection management - is this for recovery process?          2. Card management - Is this maintained in Data ware house/ Data lake? Can this be consumed?          3. Payments system - is payments related data available in DWH or Datalake? Is this needed for CRM          4. How many CTI Agents are there?</p>	<p>Bidder to comply with RFP terms and conditions.</p>



142	65	Annexure 8 - Scope of Work	<p>6. In addition to the above modules, all other standard modules/functiona lities available in the market presently suited to BFSI sector shall be proposed in the solution along with case studies, functional specification documents and other documents relevant for showcasing the same.</p>		<p>During prospect to customer conversion, what are the checks / validations performed? What is the Customer master?</p>	<p>Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.</p>
143	65	Annexure 8 - Scope of Work	<p>4. Collaborative CRM: This pillar shows how the data or processes are interacting with various applications, teams, processes, channels, etc. Social Media Management, Chatbot, Call Center Management, Campaign Management etc., comes under this module.</p>		<p>Can you confirm whether the bank currently has its own Chatbot or Call Centre Management solution that requires integration? Or does the bank need to obtain a Chatbot or Call Centre Management solution from a vendor?</p>	<p>Bidder to refer clause 35.1 of Annexure-8 Scope of work of the RFP.</p>



144	65	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		What is the size of the customer database for migration.	At present, Bank is having approx. 14 crore+ clientele base. Bidder to comply with RFP terms and conditions.
145	65	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		For hardware sizing purpose please share the volumetrics such as total customer base, total number of users, attachments/documnets, emails etc.	At present, Bank is having approx. 14 crore+ clientele base with 80k+ users.



146	65	Annexure 8 - Scope of Work	7. The cloud infrastructure, software specification, Server Side, Client Side and Network Bandwidth required for the proposed CRM solution needs to be shared by the bidder in the response. Bidder also need to share Deployment Model, Software Architecture diagram, Network Architecture Diagram, Schema Design , Performance Benchmark of the solution,		Since the proposed solution is SaaS therefore these specifications are not relevant, hence request you to kindly remove it	Bidder to comply with RFP terms and conditions.
147	66	Annexure 8 - Scope of Work	9. The proposed CRM Solution should support 5,000 concurrent users in APP/WEB/DB servers.		We request Bank to provide user count (module-wise) year on year for complete 5 years with minimum commitment year on year so that we can arrive on optimal cost.	Initially 15000 users. The selected Bidder has to provide additional user licenses as per Bank's requirement at the same cost during contract period. Bidder to comply with RFP terms and conditions.



148	66	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		What would be the approx. size for Data Migration 1-2 years etc ?	The selected bidder should migrate the current and historical data as per Bank's requirement. Bidder to comply with RFP terms and conditions.
149	66	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		Kindly share the number of entities at a high level to be migrated and corresponding volumes to be migrated to new system. Assuming this would be a one time migration and clean data will be provided by the bank in a defined csv format.	The selected bidder should migrate the current and historical data as per Bank's requirement. Bidder to comply with RFP terms and conditions.

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150	66	Annexure 8 - Scope of Work	8. The bidder should propose the solution as per Bank's requirements with high availability & secure infrastructure in cloud environment at Data Centre and Disaster Recovery site as per Industry accepted security standards and best practices to deliver the best throughput and performance considering the present as well as annual incremental volumes (for contract period)		<p>The proposed CRM platform is a cloud/SaaS based solution and will be hosted in Zoho's secured data center. The hardware, software and infrastructure requirements will be fully owned &amp; managed by Zoho.</p> <p>As the proposed CRM platform is cloud based, the ability to convert to on-premise or hybrid at any point in time will not be directly feasible and has to be thoroughly reviewed with Zoho's Infrastructure &amp; security team. The proposed CRM platform does not have the capability to host in other public CSP and will work as intended in Zoho Cloud</p>	Bidder to comply with RFP terms and conditions.
151	66	Annexure 8 - Scope of Work	9. The proposed CRM Solution should support 5,000 concurrent users in APP/WEB/DB servers.		<p>It is mentioned as 5000 concurrent users. Please provide the list of departments, users and volume of transactions for the bidder to quantify and plan the resources, costing and timelines accordingly.</p>	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
152	66	Annexure 8 - Scope of Work	9. The proposed CRM Solution should support 5,000 concurrent users in APP/WEB/DB servers.		<p>Is this the count of Public using the Customer portal? If yes, can Anonymous users access Portal?</p>	Staff and customers/ consumers/ anyone as determined by the Bank from time to time. Bidder to comply with RFP terms and conditions.



153	66	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		Volume of Service Requests: Load only the Open cases or historical as well? If Historical, what is the cut-off and the volume of it? Are Appointments / Tasks / Collection process part of Case data?	Open as well as historical data as per Bank's requirement. Bidder to comply with RFP terms and conditions.
154	66	Annexure 8 - Scope of Work	16. The selected bidder should ensure that Solution supplied should be capable to get integrated with all existing integrations (including API calls and DB integrations). All integrations to be STP without manual interventions. All the features currently available in the current solution needs to be made available in the solution proposed by the bidder.		Any middleware / SOA framework in place?	Bidder should integrate through Bank's API Gateway/ any other permissible mode, acceptable to the bank. Bidder to comply with RFP terms and conditions.



155	66	Annexure 8 - Scope of Work	<p>8. The bidder should propose the solution as per Bank's requirements with high availability &amp; secure infrastructure in cloud environment at Data Centre and Disaster Recovery site as per Industry accepted security standards and best practices to deliver the best throughput and performance considering the present as well as annual incremental volumes (for contract period)</p>		<p>Keeping in mind the Banks requirement on PII and critical data not to be stored on the Cloud, hence there will be a deployment which have to be done on-premise</p> <p>We request the Bank to clarify the Data centre and Disaster Recovery site are on-premise. We request Bank to modify the commercial template to capture the cost of on-premise part of the deployment which will be in Capex model.</p> <p>We recommend that till the point of cloud adoption is clear with the Bank, the entire deployment should be on-premise on a hyper-converged cloud ready infrastructure with a capability to convert to full cloud / hybrid based on Bank's requirement/discretion at any point of time during the contract period. The Bidder can be asked to include the cost of the same</p>	<p>Bank's DC &amp; DRC are on-premises. Bidder to comply with RFP terms and conditions.</p>
156	66	Annexure 8 - Scope of Work	<p>15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.</p>		<p>Kindly confirm the size of the database size to be migrated?</p>	<p>At present, Bank is having approx. 14 crore+ clientele base. Bidder to comply with RFP terms and conditions.</p>



157	66	Annexure 8 - Scope of Work	9. The proposed CRM Solution should support 5,000 concurrent users in APP/WEB/DB servers.		Requesting Bank to provide the growth projections for the number of concurrent users , number of customers, number of branches etc for the contract duration.	Presently, concurrency sought is for 5000 users only
158	66	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		How many source systems are having Leads and Customer Service Data? We assume that Bank will be providing Customer, Lead and Customer Sertvice data in excel file. Vendor will provide excl file template. We are assuming that only 3 tables are in scope for data migration	Currently, Bank is having 50+ source systems. The selected bidder should integrate existisng as well new source systems required for comprehensive CRM solution. Bidder to comply with RFP terms and conditions.
159	66	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		What is data volume of Customers, Leads and Customer Service? Are there any attachments which needs to be migrated?	At present, approx. 14 crore+ clientale base. Bidder to comply with RFP terms and conditions.



160	66	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		Is bank having any ETL available which can be used for data migration?	Bidder should provide ETL for data migration in the proposed CRM solution. Bidder to comply with RFP terms and conditions.
161	66	Annexure 8 - Scope of Work	9. The proposed CRM Solution should support 5,000 concurrent users in APP/WEB/DB servers.		Please provide the break of users based on Functionality usage for e.g Sales User, Service User, Contact Center Users, Analytics User etc.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



162	66	Annexure 8 - Scope of Work	13. The selected bidder is responsible for set up, installation and testing the required cloud services/Software, Integrations (including API calls and SDK integrations) with associated servers/services for providing all the features of the CRM solution, migration of existing customers data, cases and lead data, deployment of the solution in Development, UAT, Pre-Production, DC		Please provide the data migration volume which will be part of the implementation scope	At present, Bank is having approx. 14 crore+ clientele base. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
163	66	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		kindly share the volume of customer data to be considered for migration activity	At present, approx. 14 crore+ clientele base. Bidder to comply with RFP terms and conditions.



164	66	Annexure 8 - Scope of Work	8. The bidder should propose the solution as per Bank's requirements with high availability & secure infrastructure in cloud environment at Data Centre and Disaster Recovery site as per Industry accepted security standards and best practices to deliver the best throughput and performance considering the present as well as annual incremental volumes (for contract period)		Salesforce (proposed CRM) is completely cloud based solution. Though data can be archived and migrated to the on prem DW	Bidder to comply with the scope of work as per RFP terms.
165	66	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.		Please provide details in terms of the volume of data to be migrated. Also, we would not be responsible for data cleaning/ cleansing/ deduplication etc Please provide the data in the below format:- Legacy data to migrate (either in KBs/MBs/GBs or Number of records) File / attachment size to migrate (in GBs) If possible, please provide object wise data for 2.a (Number of existing leads, applications, customers, cases, activities, events etc.)	At present, approx. 14 crore+ clientele base. Bidder to comply with RFP terms and conditions.



166	66	Annexure 8 - Scope of Work	<p>8. The bidder should propose the solution as per Bank's requirements with high availability &amp; secure infrastructure in cloud environment at Data Centre and Disaster Recovery site as per Industry accepted security standards and best practices to deliver the best throughput and performance considering the present as well as annual incremental volumes (for contract period)</p>		<p>A complete SaaS solution can not be converted to on-premise solution as-it-is or store some data in on-premise and some on cloud, therefore request you to please remove these clauses</p>	<p>Bidder to refer Corrigendum-2.</p>
167	66	Annexure 8 - Scope of Work	<p>16. The selected bidder should ensure that Solution supplied should be capable to get integrated with all existing integrations (including API calls and DB integrations). All integrations to be STP without manual interventions. All the features currently available in the current solution needs to be made available in the solution proposed by the bidder.</p>		<p>Please provide comprehensive list of functionality available in current solution</p>	<p>Currently, Bank is using ConnectQ CRM for call centre purpose.</p>



168	67	Annexure 8 - Scope of Work	15. The selected bidder is responsible for Migration of customer data, existing leads and service request/case data, Migration strategy, Migration Plan, Pre and Post migration reconciliation and Audit support in the new solution.	What are integration touch Points? Are API exposed to Cloud? Is there an ESB Layer?	Bidder should integrate through Bank's API Gateway/ any other permissible mode, acceptable to the bank. Bidder to comply with RFP terms and conditions.
169	67	Annexure 8 - Scope of Work	23. The selected bidder to provide the latest version of the solution/mobile client etc., as and when the same has been upgraded at their end at no extra cost to the bank	would bank like to extend the CRM features on mobile device as well. If Yes, Kindly share what will be the platform preference	Yes (Android, IOS)
170	68	Annexure 8 - Scope of Work	28. Any information security gaps in the solution shall be redressed by the selected bidder on free of cost during contract period.	Any AML systems in place? How frequently is it validated?	Bidder to comply with RFP terms and conditions.



171	68	Annexure 8 - Scope of Work	29. The selected bidder should provide proper backup and recovery procedure, with necessary documents so as to meet any exigencies. The Regulatory guidelines on the preservation of data should be followed correctly. Proper Data Archival & Purging needs to be implemented for proper performance as per the Bank's guidelines.		How many years to maintain?	As per Bank's Back-up & Data archival policy.
172	68	Annexure 8 - Scope of Work	31. The following details should be available as part of compressed case 360 views:	<ul style="list-style-type: none"> <li>31.1. Case Summary details</li> <li>31.2. Case life cycle</li> <li>31.3. Related Solutions</li> <li>31.4. Case-Agent Mapping</li> <li>31.5. Internal Collaboration</li> <li>31.6. Customer Interaction history</li> <li>31.7. Call Script</li> <li>31.8. Service Quality Feedback</li> <li>31.9. Alerts</li> <li>31.10. Surveys</li> <li>31.11. Attachments</li> </ul>	Any Data ware housing in place?	Yes
173	68	Annexure 8 - Scope of Work	35. Integration:	<ul style="list-style-type: none"> <li>35.1. The proposed solution should integrate with CBS and allied applications like Enterprise Fraud Risk Management, Digital Lending Platform, Co-lending platforms, CPGRS, MIS/ Data Warehouse analytics, chatbot etc., as per Bank's requirement.</li> </ul>	<ul style="list-style-type: none"> <li>Are all these systems accessible through REST API?</li> <li>Chatbot - Is this virtual or agent assisted?</li> <li>If virtual, how many product lines does it support? How many menus per product? Any Knowledge repository to back up answers?</li> <li>How is credit risk / credit worthiness assessed?</li> <li>what is the HRMS system in place?</li> </ul>	Bidder should integrate through Bank's API Gateway/ any other permissible mode, acceptable to the bank. Bidder to comply with RFP terms and conditions.



174	68	Annexure 8 - Scope of Work	35.Integration:	35.1. The proposed solution should integrate with CBS and allied applications like Enterprise Fraud Risk Management, Digital Lending Platform, Co-lending platforms, CPGRS, MIS/ Data Warehouse analytics, chatbot etc., as per Bank's requirement.	Is there any defined list of Applications to be Integrated with CRM which can be used to fence the scope of work from Integration point view	All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.
175	68	Annexure 8 - Scope of Work	35.Integration:	35.1. The proposed solution should integrate with CBS and allied applications like Enterprise Fraud Risk Management, Digital Lending Platform, Co-lending platforms, CPGRS, MIS/ Data Warehouse analytics, chatbot etc., as per Bank's requirement.	1. Is this the complete list of the systems with which the system needs to be integrated? Request Bank to help us with complete list of systems (including Channels) with which CRM needs to be integrated? 2. Is it expected to integrate with Bank's Chatbot? Or provide the chatbot as well as part of Implementation?	All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.
176	68	Annexure 8 - Scope of Work	34.	The solution provided by the selected bidder should have ability to indicate the industry and sector the customer operates in.	Please elaborate more on this	The RFP clause broadly refers to Customer segmentation based on various parameters as per Banking Industry standards.



177	68	Annexure 8 - Scope of Work	30. The selected bidder shall also ensure that the proposed solution is scalable and shall be implemented in DR environment in Active -Passive Mode with DC Environment. Application and Database in DC environment shall be replicated to DR Environment through standard data transfer/replication and synchronization mechanism without any Data Loss in case of any service		Data loss in proposed SaaS solution will be as per RTO of the solution, hence a zero data loss scenario is not possible, request you to please amend this clause accordingly	Bidder to comply with RFP terms and conditions.
178	68	Annexure 8 - Scope of Work	35. Integration:	35.1. The proposed solution should integrate with CBS and allied applications like Enterprise Fraud Risk Management, Digital Lending Platform, Co-lending platforms, CPGRS, MIS/ Data Warehouse analytics, chatbot etc., as per Bank's requirement.	kindly share the list of other application integration with CRM	All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.



179	68	Annexure 8 - Scope of Work	<p>29. The selected bidder should provide proper backup and recovery procedure, with necessary documents so as to meet any exigencies. The Regulatory guidelines on the preservation of data should be followed correctly. Proper Data Archival &amp; Purging needs to be implemented for proper performance as per the Bank's guidelines.</p>		<p>Are there any archiving regulatory standards that we can refer to , or is the question more intended to outline archival as a capability? Do you have existing infrastructure that can be used for archived data (e.g, database, disk space) / or do you need the scope to also include the infrastructure for archival?</p>	<p>As per Bank's Back-up &amp; Data archival policy. Bidder to comply with RFP terms and conditions.</p>
180	68	Annexure 8 - Scope of Work	<p>33. Testing and Acceptance:</p>	<p>The Bank will conduct "User Acceptance Test" (UAT) under guidance, review, and supervision of the selected bidder to ensure that all the functionalities required by the Bank as mentioned in this Scope of Work and Functional Requirements are available and is functioning accurately as per the expectations of the Bank. Consequent to UAT, if some of the functionalities, specified in this Scope of Work and Functional Requirements are not present in tune with the Bank's expectations, the selected bidder shall make appropriate changes for the functioning of the Solution.</p>	<p>Do you have guidance on UAT timelines based on historical trends? Do you have any specific timeline constraints for the implementation of the overall solution (e.g. cannot go live in March or Dec, should have a release every 3 months etc)</p>	<p>Bidder to comply with RFP terms and conditions.</p>



181	68	Annexure 8 - Scope of Work	35.Integration:	35.1. The proposed solution should integrate with CBS and allied applications like Enterprise Fraud Risk Management, Digital Lending Platform, Co-lending platforms, CPGRS, MIS/ Data Warehouse analytics, chatbot etc., as per Bank's requirement.	Please mention all the systems to be integrated for Sales, Service, Card, Campaign, Collection Management etc. The cost of the Tools/ Systems/ APIs/ Connector will be borne by Canara Bank.	All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.
182	68	Annexure 8 - Scope of Work	35. Integration:	35.1. The proposed solution should integrate with CBS and allied applications like Enterprise Fraud Risk Management, Digital Lending Platform, Co-lending platforms, CPGRS, MIS/ Data Warehouse analytics, chatbot etc., as per Bank's requirement.  35.5. The proposed solution should integrate with various mobile/web applications of the Bank, such as HRMS, Business Dashboard etc., through AD / DMS. The proposed solution should provide SDKs for integrating with any of the applications of the Bank.  35.6. The proposed solution should integrate with Email gateway (SMTP service & Server level Email Authentication) and SMS Gateway etc., of the Bank through DB/API's interfaces.	Please provide complete list of systems that needs to be integrated with proposed solution. Also please provide the volume and mode (Realtme, scheduled batch, API based, File based etc) for these integration required  Also, please confirm, if solutions like Data warehouse analytics/Chatbot/mobile application are existing or do you want vendor to propose these solutions	All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.
183	69	Annexure 8 - Scope of Work	35.Integration:	35.6. The proposed solution should integrate with Email gateway (SMTP service & Server level Email Authentication) and SMS Gateway etc., of the Bank through DB/API's interfaces..	Could the bank provide us an Inventory List of All Applications that need to be integrated with CRM Solution. And the integration Use cases.	All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.



184	69	Annexure 8 - Scope of Work	37.Training:	37.1. The selected bidder should provide training for 5 days in Two (2) batches after sign off by the Bank for end to end implementation of comprehensive CRM Solution. Each batch consists of 25 officials. The training should be on the proposed Solution from OEM/OSD directly at Bangalore at Bank's premises/Bidder's chosen location in Bangalore.	Could the Bank confirm they will be responsible for end to end rollout of the application to other Branches and Users across India. And bidder would just need to provide Warranty Support Remotely	Bidder should ensure complete implementation of proposed comprehensive CRM solution as per RFP terms. Bidder to comply with RFP terms and conditions.
185	69	Annexure 8 - Scope of Work	35.Integration:	35.2. The proposed solution should integrate with Middleware (existing/proposed) and APIs of Bank as per Bank's requirement.	Which is the existing Middleware the Bank uses? Or its yet to be procured? In such case when the middleware is expected to be procured by the Bank?	Bidder should integrate through Bank's API Gateway/ any other permissible mode, acceptable to the bank. Bidder to comply with RFP terms and conditions.
186	69	Annexure 8 - Scope of Work	37.Training:	37.1. The selected bidder should provide training for 5 days in Two (2) batches after sign off by the Bank for end to end implementation of comprehensive CRM Solution. Each batch consists of 25 officials. The training should be on the proposed Solution from OEM/OSD directly at Bangalore at Bank's premises/Bidder's chosen location in Bangalore.	Training - We follow a Train -The-Trainer (TTT) approach to train bank's super users. The bank's end user training will be carried by bank's Train the Trainers (Super Users) .Please confirm.	Bidder to comply with RFP terms and conditions.
187	69	Annexure 8 - Scope of Work	35.Integration:	35.6. The proposed solution should integrate with Email gateway (SMTP service & Server level Email Authentication) and SMS Gateway etc., of the Bank through DB/API's interfaces.	Can we assume that bank is currently using SMS gateway to deliver SMS alerts and same SMS gateway can be utilized in CRM	Yes. Bidder to comply with RFP terms and conditions.
188	69	Annexure 8 - Scope of Work	35.Integration:	35.2. The proposed solution should integrate with Middleware (existing/proposed) and APIs of Bank as per Bank's requirement.	Do we need to use existing middleware or we need to propose a new one, in case of existing, please provide details of same	Bidder should integrate through Bank's API Gateway/ any other permissible mode, acceptable to the bank. Bidder to comply with RFP terms and conditions.
189	70	Annexure 8 - Scope of Work	38.Cloud:	38.3. Bidder need to provide whether the solution is hosted in a single tenancy model or multi-tenancy model. In case of multi-tenancy model bidder need to share what compartmentalization techniques are employed to isolate Bank data from other tenant's data (wherever Applicable in Cloud/Hybrid).	Kindly re-confirm whether Canara Bank is open for multi-tenancy cloud deployment of their CRM application?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



190	70	Annexure 8 - Scope of Work	38.Cloud:	38.12. All functions involving critical data to be maintained on-premises only while functions involving non critical data can be moved to Cloud thereby adopting Hybrid Cloud model approach.	As per our understanding, connectivity will be there between on-premises datacenter and cloud, we recommend having application and database servers on cloud. This will avoid any latency. Kindly suggest.	Bidder to comply with RFP terms and conditions.
191	70	Annexure 8 - Scope of Work	38.Cloud:	38.6. The solution must have capability to work on Hybrid Model (i.e., Cloud and On-premises component for data exchange).	Staging Server / Real Time API Calls for data visibility. What is the expectation from cloud model?	PII data should be on premises. Application and permissible non critical data in encrypted format may be in cloud. Please read this reply along with various clauses of RFP. Bidder to comply with RFP terms and conditions.
192	70	Annexure 8 - Scope of Work	38.Cloud:	38.5. Preferably Canara Bank tenant resources to be on dedicated physical hypervisors of the CSP.	Please elaborate on the expectation?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
193	70	Annexure 8 - Scope of Work	38.Cloud:	38.1. The Solution should be deployed on the Cloud architecture (SaaS model) with the adaptability to the on demand up-scaling and down-scaling and seamless failover movements of the instances.	Please share us the volume of transaction and the list of users for us to plan the Cloud/Infrastructure requirements. The on-demand upscaling/downscaling is not available.	At present, Bank is having approx. 14 crore+ clientele base with 80k+ users. Bidder to comply with RFP terms and conditions.
194	70	Annexure 8 - Scope of Work	38.Cloud:	38.2. Bidder should ensure that CSP should be valid MeitY empaneled Cloud Service Provider with two data center locations.	The proposed CRM platform is a cloud/SaaS based solution and will be hosted in Zoho's secured data center. The hardware, software and infrastructure requirements will be fully owned & managed by Zoho.  The Primary Data center is in Mumbai and the Secondary Data center is in Chennai. Based on Zoho's propriety SaaS framework and cloud deployments, it does not directly comply as Meity Empaneled Cloud Service Provider, but the data centers adheres to ISO processes (ISO 27001, 27701, 27017, 27018, 9001, 20000), SOC, GDPR, TIA guidelines and policies	Bidder to comply with RFP terms and conditions.



195	70	Annexure 8 - Scope of Work	38.Cloud:	38.3. Bidder need to provide whether the solution is hosted in a single tenancy model or multi-tenancy model. In case of multi-tenancy model bidder need to share what compartmentalization techniques are employed to isolate Bank data from other tenant's data (wherever Applicable in Cloud/Hybrid).	As the proposed solution will be hosted in Zoho Cloud, the compartmentalization logic is proprietary/confidential, we will not be able to share the implementation details in the case of a multi tenancy model.	Bidder to comply with RFP terms and conditions.
196	70	Annexure 8 - Scope of Work	38.Cloud:	38.6. The solution must have capability to work on Hybrid Model (i.e., Cloud and On-premises component for data exchange).	The proposed CRM platform is a cloud/SaaS based solution and will be hosted in Zoho's secured data center. The hardware, software and infrastructure requirements will be fully owned & managed by Zoho.  As the proposed CRM platform is cloud based, the ability to convert to on-premise or hybrid at any point in time will not be feasible and has to be thoroughly reviewed with Zoho's Infrastructure & security team. The proposed CRM platform does not have the capability to host in other public CSP and will work as intended in Zoho Cloud.	Bidder to comply with RFP terms and conditions.
197	70	Annexure 8 - Scope of Work	38.Cloud:	38.9.3. Adhering to NIST (especially 800-53) and CSF (Cyber Security Framework) standard best practices.	Please let know if the NIST and CSF adherence is required, as Zoho application align with ISO and global security standards.	Bidder to comply with RFP terms and conditions.
198	70	Annexure 8 - Scope of Work	38.Cloud:	38.10. Bidder and its solution must be adhering to bank's policies, bank's cloud and IS security policies, statutory, RBI and other government guidelines.	The proposed solution is recommended to adhere with the existing ISO processes, security guidelines and compliance as defined by Zoho, as it servers millions of businesses across globe.  If Canara Bank has specific Security standards or other policies, it has to be shared with Zoho for review and then mutually agreed by both parties.	Bidder to comply with RFP terms and conditions.



199	70	Annexure 8 - Scope of Work	38.Cloud:		<p>Since the Bank has segregated data residency between on-premise and public cloud, functionalities that are dependent on critical data have to be on-premise and cannot be put on cloud. Hence, only cloud doesn't exist based on the RFP ask. Request the Bank to remove only cloud as an option.</p> <p>Additionally, we recommend that the entire solution should be deployed on a hyper-converged cloud ready infrastructure with a capability to convert to full cloud / hybrid based on Bank's requirement/discretion at any point of time during the contract period. The Bidder can be asked to include the cost of the same.</p>	Bidder to comply with RFP terms and conditions.
200	70	Annexure 8 - Scope of Work	38.Cloud:	38.9.1. Regular VAPT, API Assessment, Source Code audit certified by a CERT-IN empaneled auditor.	We provide Security Assessment (aka VAPT) by globally reputed third party security auditors. However It may not be a CERT-in empaneled auditor, request you to please amend this clause to include third party security auditors as well	Bidder to comply with RFP terms and conditions.
201	70	Annexure 8 - Scope of Work	38.Cloud:	38.4. The proposed TSP/CSP should ensure that any data that is stored on the cloud is protected and appropriate policies and controls are put in place to provide data privacy and protection. The CSP should adhere to all laws pertaining to data privacy and protection that are applicable as per Gol, RBI and any other regulators. The CSP should also ensure that necessary enhancements are made to the services provided whenever there are changes sought either by the regulators or Government of India without any additional cost to the Bank.	The SaaS solution provider will be responsible to comply with legal guidelines applicable to its services (such as Meity), while the Bank will be responsible to comply with regulatory guidelines (eg RBI). Please let us know bank's point of view for the assumption considered.	Bidder to comply with RFP terms and conditions.



202	70	Annexure 8 - Scope of Work	38.Cloud:	38.9.1. Regular VAPT, API Assessment, Source Code audit certified by a CERT-IN empanelled auditor.	Source code is company confidential and hence reports of Source Code review might not be made available. However, our SOC 2 audit reports will attest that the process is followed. Further, we are not mandated to have our VAPT conducted by CERT-In empanelled auditors. We have a CREST empanelled third party conduct these tests for us. The Bank can empanel a Cert-In empanelled auditor to conduct Application VAPT at their own discretion. Please let us know if this works for the bank.	Bank will conduct the audits and the selected bidder has to do necessary changes in the configuration directed by security team of the bank after security audits like VAPT, Code Audit etc., without disturbing the production and existing backed up copies and at no additional cost to the Bank.
203	70	Annexure 8 - Scope of Work	38.Cloud:	38.5. Preferably Canara Bank tenant resources to be on dedicated physical hypervisors of the CSP.	There will be logical separation of the Bank's data and will be secured and not shared with any other instance. Salesforce is a metadata-driven, multi-tenant architecture, where only metadata is shared and Bank's data is not. Please let us know if this works for the bank.	Bidder to comply with RFP terms and conditions.
204	70	Annexure 8 - Scope of Work	38.Cloud:	38.8. Bidder should ensure data retention, masking of data, archiving, destruction of data, sharing of data, encryption of critical data etc. as per the bank's requirement.	Most of these controls are and can be configured by the Bank such as retention, backup., archival and the Bank's appointed team can perform these activities by themselves. Please let us know if this works for the bank.	Bidder to comply with RFP terms and conditions.
205	70	Annexure 8 - Scope of Work	38.Cloud:	38.6. The solution must have capability to work on Hybrid Model (i.e., Cloud and On-premises component for data exchange).	The system is available on cloud only	Bidder to comply with RFP terms and conditions.
206	71	Annexure 8 - Scope of Work	38.Cloud:	38.12. All functions involving critical data to be maintained on-premises only while functions involving non critical data can be moved to Cloud thereby adopting Hybrid Cloud model approach.	Can you clarify what is definition of Non Critical Data ?	Apart from PII data, rest of the data can be considered as non-critical data.
207	71	Annexure 8 - Scope of Work	38.Cloud:	38.13. Ensure that any sensitive information or PII (Personally Identifiable Information) including Canara Bank customer's ID, PAN, Aadhar, GST Number, Account number, Card Number, PIN/CVV, Full Address, Mobile Number, Email Address etc. are not stored/cached in the Cloud in any form.	Some this data are required on Cloud for Identification and deduplication Eg Email : for Auto Case Creation and tagging right customer, call landing (CTI) etc	Customer ID will be stored on cloud in encrypted format which is non-inclusive of PII data. Bank will decide the logic for cipher to encrypt the Customer ID/Customer IC. Bidder to comply with RFP terms and conditions.



208	71	Annexure 8 - Scope of Work	38.Cloud:	38.12. All functions involving critical data to be maintained on-premises only while functions involving non critical data can be moved to Cloud thereby adopting Hybrid Cloud model approach.	There might be need to bring certain data to cloud to data massaging on run analytics also to identify customers when they are calling from their phone for customer support? So would basic demographic data would be allowed to capture on cloud?	Customer ID will be stored on cloud in encrypted format which is non-inclusive of PII data. Bank will decide the logic for cipher to encrypt the Customer ID/Customer IC. Bidder to comply with RFP terms and conditions.
209	71	Annexure 8 - Scope of Work	38.Cloud:	38.12. All functions involving critical data to be maintained on-premises only while functions involving non critical data can be moved to Cloud thereby adopting Hybrid Cloud model approach.	<p>Salesforce allows you to control who sees what data down to the field level with standard features such as field-level security settings, record access settings, and object permissions.</p> <p>Salesforce Data Mask is a powerful data security resource for Salesforce admins and developers Data Mask enables admins and developers to mask sensitive data in sandboxes such as Personally Identifiable Information (PII). Data Mask uses platform-native obfuscation technology to mask sensitive data in any full or partial sandboxes. The masking process lets you mask some or all sensitive data with different levels of masking, depending on the sensitivity of the data. Once your sandbox data is masked, you can't unmask it</p> <p>Salesforce is a multi-tenant and metadata driven architecture and stores its data on Trusted Public cloud residing in India. And the Bank's requirement is to get Customer360 on CRM which can be achieved only bringing the data into Salesforce, which is available only on cloud. Hence, we request the Bank to relax this clause.</p>	Bidder to comply with RFP terms and conditions.
210	71	Annexure 8 - Scope of Work	38.Cloud:	38.18. Bidder should provide list of latest security certification of their private /public Cloud service provider (CSP) and their validity - NIST, CSA, PCI DSS, IT ACT 2008 and amendments, India Data Privacy Bill, MEITY certification	<p>The CSP will provide ISO 27001, 27017, 27018, SOC 1,2,3, PCI, as available on Salesforce Compliance Portal.</p> <p>The CSP requests the Bank to relax the certification required for India Data Protection Bill, as the same is not out yet by the Govt. of India.</p>	Bidder to comply with RFP terms and conditions.

211	71	Annexure 8 - Scope of Work	38.Cloud:	<p>38.13. Ensure that any sensitive information or PII (Personally Identifiable Information) including Canara Bank customer's ID, PAN, Aadhar, GST Number, Account number, Card Number, PIN/CVV, Full Address, Mobile Number, Email Address etc. are not stored/cached in the Cloud in any form.</p>	<p>Could the Bank confirm , if there ok for us to have minimal PII data on Cloud. We would require Minimum PII data(Mobile, Email ID, Customer ID and Account ID) to be stored in CRM for performing simple operations like below</p> <ul style="list-style-type: none"> <li>- Searching customer Records in CRM to register a lead or Complaint</li> <li>- Launching Email Campaigns</li> <li>- Logging a Request or Complaint on behalf of customer.</li> <li>- Viewing Customer 360 Degree view.</li> </ul> <p>Without the above it will be difficult for CRM to work effectively. Bank to confirm.</p>	Bidder to comply with RFP terms and conditions.
212	71	Annexure 8 - Scope of Work	38.Cloud:	<p>38.16. The selected bidder has to provide required Infrastructure in cloud for proposed application and other environmental or related software along with technical proposal.</p>	<p>Could the Bank confirm if it is fine for recommending a 100% Cloud SAAS solution. Like Oracle CX Cloud.</p>	Bidder to comply with RFP terms and conditions.
213	71	Annexure 8 - Scope of Work	38.Cloud:	<p>38.13. Ensure that any sensitive information or PII (Personally Identifiable Information) including Canara Bank customer's ID, PAN, Aadhar, GST Number, Account number, Card Number, PIN/CVV, Full Address, Mobile Number, Email Address etc. are not stored/cached in the Cloud in any form.</p>	<p>Can the couple of critical key identifiers handled in CRM?</p>	Bidder to comply with RFP terms and conditions.
214	71	Annexure 8 - Scope of Work	38.Cloud:	<p>38.15. For developing any data analytics models, the training on real data to be done on-premises and only the trained model output which doesn't contain any PII/sensitive/privacy data may be consumed in the cloud.</p>	<p>Will Bank's IT handle this?</p>	Bidder to comply with RFP terms and conditions.



215	71	Annexure 8 - Scope of Work	38.Cloud:	38.12. All functions involving critical data to be maintained on-premises only while functions involving non critical data can be moved to Cloud thereby adopting Hybrid Cloud model approach.	<p>We find the following contradictions in the RFP in providing the CRM solution on SaaS Model:-</p> <p>1) RFP ask is for providing licenses on unlimited user based for perpetual enterprise model.</p> <p>2) Annexure -17 requires the bidder to quote for license and ATS fees for the solution on Capex model.</p> <p>3) Bank has segregated data residency between on-premise and public cloud but not segregated functionalities to be deployed on-premise and public cloud.</p> <p>If the Bank wants perpetual unlimited licenses, we suggest the Bank not to ask for the Solution on SaaS model.</p> <p>Additionally, we recommend that the entire solution should be deployed on a hyper-converged cloud</p>	Bidder to comply with RFP terms and conditions.
216	71	Annexure 8 - Scope of Work	38.Cloud:	38.14. In case of processing requirements of the above stated fields, Anonymize / mask /tokenize/encrypt such data in Cloud.	<p>Please confirm if data masking is required for data in use, as same has been asked in scope of work but not in functional and technical requirements section.</p> <p>Please confirm as masking service comes at additional cost</p>	Bidder to comply with RFP terms and conditions.



217	71	Annexure 8 - Scope of Work	38.Cloud:	<p>38.13. Ensure that any sensitive information or PII (Personally Identifiable Information) including Canara Bank customer's ID, PAN, Aadhar, GST Number, Account number, Card Number, PIN/CVV, Full Address, Mobile Number, Email Address etc. are not stored/cached in the Cloud in any form.</p>	<p>Salesforce allows you to control who sees what data down to the field level with standard features such as field-level security settings, record access settings, and object permissions.</p> <p>Salesforce Data Mask is a powerful data security resource for Salesforce admins and developers Data Mask enables admins and developers to mask sensitive data in sandboxes such as Personally Identifiable Information (PII). Data Mask uses platform-native obfuscation technology to mask sensitive data in any full or partial sandboxes. The masking process lets you mask some or all sensitive data with different levels of masking, depending on the sensitivity of the data. Once your sandbox data is masked, you can't unmask it</p> <p>Salesforce is a multi-tenant and metadata driven architecture and stores its data on Trusted Public cloud residing in India. And the Bank's requirement is to get Customer360 on CRM which can be achieved only bringing the data into Salesforce, which is available only on cloud. Hence, we request the Bank to relax this clause.</p>	Bidder to comply with RFP terms and conditions.
218	71	Annexure 8 - Scope of Work	38.Cloud:	<p>38.19. Cloud Service Provider should be STQC audited and empaneled and offer all services from India as per guidelines of Meity.</p>	<p>Salesforce Hyperforce (Infra) is deployed on AWS India, which is a MeitY empanelled and AWS has successfully completed the Standardization Testing and Quality Certification (STQC) audit from the MeitY</p>	Bidder to comply with RFP terms and conditions.
219	71	Annexure 8 - Scope of Work	38.Cloud:	<p>38.12. All functions involving critical data to be maintained on-premises only while functions involving non critical data can be moved to Cloud thereby adopting Hybrid Cloud model approach.</p>	<p>The system is available on cloud only. The data will be secured and hosted on the cloud . salesforce is complaint to all the major security regulations and complance</p>	Bidder to comply with RFP terms and conditions.
220	72	Annexure 8 - Scope of Work	38.Cloud:	<p>38.31. The Primary and Secondary Data Centres (Cloud) shall be physically located in India. The proposed Datacenter for DR should be in different seismic zones. The data should not be transferred out side of country's boundary by any means.</p>	<p>Request you to modify the clause as - primary and secondary cloud location separated by a minimum distance of 400Kms instead of different seismic zone.</p> <p>As per MeitY guidance for empanelment of CSPs, the DC &amp; DR sites shall be separated by a minimum distance of 100 kilometers. Refer pg34 <a href="https://www.meity.gov.in/writereaddata/files/Applica tion_Empanelment_CSPs_June_2021.pdf">https://www.meity.gov.in/writereaddata/files/Applica tion_Empanelment_CSPs_June_2021.pdf</a></p>	Bidder to comply with RFP terms and conditions.



Replies to Prebid Queries for GEM/2023/B/3283751 dated 29/03/2023 for Selection of vendor for end to end implementation of comprehensive Customer Relationship Management (CRM) solution for 5 years

221	72	Annexure 8 - Scope of Work	38.Cloud:	38.28. The CASB (Cloud Access Security Broker) security controls need to be enforced from cloud standpoint.	This requires additional licensing at the user side. Do we need to consider individual licensing for each CRM user?	Bidder should include total cost to the Bank in BOM for this RFP. Bidder to comply with RFP terms and conditions.
222	72	Annexure 8 - Scope of Work	38.Cloud:	38.31. The Primary and Secondary Data Centres (Cloud) shall be physically located in India. The proposed Datacenter for DR should be in different seismic zones. The data should not be transferred out side of country's boundary by any means.	All DCs are in Mumbai. However, as per AWS's own Resiliency Paper, the Asia Pacific (Mumbai) Region AZs are situated in an area with a moderate seismic risk with a 250-year return period of soil-adjusted damaging earthquake ground motions per the property insurer FM Global (equating to SDS=0.55g and SD1=0.25g) or Seismic Zone III per Indian Standard 1893 (2002). AWS's datacenters within these AZs meet or exceed local building codes with incorporation of an importance factor in their design to further protect their infrastructure.	Bidder to comply with RFP terms and conditions.
223	72	Annexure 8 - Scope of Work	38.Cloud:	38.28. The CASB (Cloud Access Security Broker) security controls need to be enforced from cloud standpoint.	Please elaborate more on the CASB security controls and will Canara Bank have/provide the CASB solution & enforce security controls with respect to usage of Zoho SaaS in Canara Bank solution?	Bidder to comply with RFP terms and conditions.
224	72	Annexure 8 - Scope of Work	38.Cloud:	38.36. The Bidder's/Bidder's CSP shall ensure that services offered under SaaS provide tools / capability for encryption of data-at-rest, data-in-processing/use, data-in-transit and field level encryptions. CSP to support end-to-end encryption.	The data at rest and data in transit are encrypted. At present we, do not support the end-to-end encryption.	Bidder to comply with RFP terms and conditions.
225	72	Annexure 8 - Scope of Work	38.Cloud:	38.36. The Bidder's/Bidder's CSP shall ensure that services offered under SaaS provide tools / capability for encryption of data-at-rest, data-in-processing/use, data-in-transit and field level encryptions. CSP to support end-to-end encryption.	We offer encryption for data at rest and in-transit. Encryption while processing may not be available as decrypted data may be required for processing.	Bidder to comply with RFP terms and conditions.
226	73	Annexure 8 - Scope of Work	38.Cloud:	38.43. The CSP should be able to provide geographic or IP based restrictions.	Is location based endpoint access also a part of this? This will require licensing at the user side for Identity and Access Management (IAM)	Bidder to comply with RFP terms and conditions.
227	73	Annexure 8 - Scope of Work	38.Cloud:	38.48. The CRM application should be OWASP & PA-DSS compliant.	The current RFP is for implementation of CRM solution, which is not a payments application for it to be required to comply with PA-DSS. We request the Bank to clarify this ask?	Bidder to comply with RFP terms and conditions.



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228	73	Annexure 8 - Scope of Work	38.Cloud:	38.49. CSP should provide secure repository of the digital certificates etc.	Need more clarity for responding to this ask. What repository is the Bank looking at? We request the Bank to give examples of digital certificates that you have mentioned here.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
229	73	Annexure 8 - Scope of Work	38.Cloud:	38.48. The CRM application should be OWASP & PA-DSS compliant.	Please let know if the Card transaction or authorization details is expected to be stored in the CRM?	Yes
230	73	Annexure 8 - Scope of Work	38.Cloud:	38.43. The CSP should be able to provide geographic or IP based restrictions.	Please elaborate more.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
231	74	Annexure 8 - Scope of Work	39. The cloud service to be availed by the bidder for Bank shall have the following certifications, in addition to MEITY accreditation.	39.1. ISO 27001, ISO 22301 certification.	We can provide ISO 27001, 27017, 27018, SOC 1,2,3, PCI DSS, SOC 1, SOC 2, SOC 3, NIST SP 800-171, CSA Star, C5 (ISAE 3000), APEC Certification for Processors and Controllers. We are not ISO 22301 and ISO 27701 compliant. Salesforce has Data Privacy controls and protection mechanisms to protect customer data in line with leading privacy law requirements. Details can be availed on <a href="https://www.salesforce.com/in/company/privacy/">https://www.salesforce.com/in/company/privacy/</a> Request the Bank to relax this clause	Bidder to comply with RFP terms and conditions.
232	74	Annexure 8 - Scope of Work	39. The cloud service to be availed by the bidder for Bank shall have the following certifications, in addition to MEITY accreditation.	39.4. ISO/IEC 27701 PIM (Privacy Information Management) certified.	We can provide ISO 27001, 27017, 27018, SOC 1,2,3, PCI DSS, SOC 1, SOC 2, SOC 3, NIST SP 800-171, CSA Star, C5 (ISAE 3000), APEC Certification for Processors and Controllers. We are not ISO 22301 and ISO 27701 compliant. Salesforce has Data Privacy controls and protection mechanisms to protect customer data in line with leading privacy law requirements. Details can be availed on <a href="https://www.salesforce.com/in/company/privacy/">https://www.salesforce.com/in/company/privacy/</a> Request the Bank to relax this clause	Bidder to refer Corrigendum-2.
233	74	Annexure 8 - Scope of Work	40.Key management:	40.1. Encryption keys which are used for encryption in cloud should support BYOK (Bring Your Own Keys) and use along with KMS (Key management Service).	Please elaborate on what KMS system the bank uses to commit on this	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



234	75	Annexure 8 - Scope of Work	46. Data/ cloud Security	46.5. All the security controls on the solution/services/application deployed on Cloud must be the responsibility of the CSP/TSP which includes below but not limited to. DLP (Data Leak/Loss Prevention) The DLP should be able to understand the Data Classification and monitor accordingly (e.g PII and PCI Data)	DLP is a technology that intersects at various level. For this RFP, is expectation to provide endpoint DLP as well to block intentional data leak through users from endpoint?	Bidder to comply with RFP terms and conditions.
235	75	Annexure 8 - Scope of Work	46. Data/ cloud Security	46.5. All the security controls on the solution/services/application deployed on Cloud must be the responsibility of the CSP/TSP which includes below but not limited to.	Does RFP also requests another set up of SOC tools and services just for CRM cloud environment? Please elaborate on security solutions that are expected as part of this project and just limited to etc.	Dashboard access must be given to bank for monitoring.
236	75	Annexure 8 - Scope of Work	43. Termination rights and process:	43.1. The SAAS Solution provided shall be portable as well as interoperable to any other CSP (data export options needs to be considered in case bank require migration to another platform)	Please elaborate on what KMS system the bank uses to commit on this	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
237	75	Annexure 8 - Scope of Work	43. Termination rights and process:	43.1. The SAAS Solution provided shall be portable as well as interoperable to any other CSP (data export options needs to be considered in case bank require migration to another platform)	As the proposed solution is 100% SAAS Solution.	Bidder to comply with RFP terms and conditions.
238	75	Annexure 8 - Scope of Work	43. Termination rights and process:	43.1. The SAAS Solution provided shall be portable as well as interoperable to any other CSP (data export options needs to be considered in case bank require migration to another platform)	A complete SaaS solution is provided by SaaS vendor on its own cloud infrastructure and cannot be ported on any other CSP's cloud infra, however you can extract the data from solution and upload and map to a new solutions, therefore request you to waive this clause for SaaS OEM	Bidder to comply with RFP terms and conditions.



239	76	Annexure 8 - Scope of Work	47. Onsite/Offsite Resources	<p>47.1. The selected bidder should provide four (4) dedicated onsite resources and two (2) dedicated offsite resources (B.E./B. Tech in IT/communication/MCA and should have OEM Certification for the proposed solution with minimum 2 years' experience) 24x7 during contract period post go-live. However, charges for onsite resources will be paid from the date of acceptance of the solution of the Bank. The cost agreed upon for the resource will be frozen during the contract period.</p>	<p>Could the confirm the below working calendar for the Onsite Resources during Warranty and AMC period. Onsite Resources/Offshore Resources will work based on Canara Bank IT Working Calendar and office Timings(8X5) and available on Call for remaining period of time to handle only P1/Critical Issues. As 24X7 would require 3 shifts of resources each shift having 2 to 3 resources or so , increasing cost</p>	<p>RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.</p>
240	76	Annexure 8 - Scope of Work	47. Onsite/Offsite Resources	<p>47.5. Any customization requiring efforts up to 20 man days should be done by onsite resources and Bank will not pay separately for this customization. No ATS/AMC is payable on such customizations.</p>	<p>As the bidder will be providing resources to the Bank . Could the Bank confirm will be responsible for Day to Day activities like below.                      - Bank will be responsible for L1 support. i.e. Ticket Creation and prioritization of work and assignment to Bidder Resources.                      - Bank will be responsible for assigning work and tickets to assigned resources based on capacity and availability .                      - Resources will be available for fixed Capacity                      - Bidders resources will be help in L2                      - Bank will be managing the resources.</p>	<p>Bidder to comply with RFP terms and conditions. Bidder will be responsible as per RFP terms.</p>
241	76	Annexure 8 - Scope of Work	47. Onsite/Offsite Resources	<p>47.1. The selected bidder should provide four (4) dedicated onsite resources and two (2) dedicated offsite resources (B.E./B. Tech in IT/communication/MCA and should have OEM Certification for the proposed solution with minimum 2 years' experience) 24x7 during contract period post go-live. However, charges for onsite resources will be paid from the date of acceptance of the solution of the Bank. The cost agreed upon for the resource will be frozen during the contract period.</p>	<p>Are these 4 + 2 resoures should be made available around the clock, which means night shifts and holiday shifts ?</p>	<p>RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.</p>



242	76	Annexure 8 - Scope of Work	47. Onsite/Offsite Resources	47.1. The selected bidder should provide four (4) dedicated onsite resources and two (2) dedicated offsite resources (B.E./B. Tech in IT/communication/MCA and should have OEM Certification for the proposed solution with minimum 2 years' experience) 24x7 during contract period post go-live. However, charges for onsite resources will be paid from the date of acceptance of the solution of the Bank. The cost agreed upon for the resource will be frozen during the contract period.	Are you expecting these 4 On Site and 2 Offshore resource to provide Level 2 and Level 3 Production support? Do you have any SLA's defined for this team?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
243	77	Annexure 8 - Scope of Work	47. Onsite/Offsite Resources	47.5. Any customization requiring efforts up to 20 man days should be done by onsite resources and Bank will not pay separately for this customization. No ATS/AMC is payable on such customizations.	Is there any cap in totality overall ?	Bidder to comply with RFP terms and conditions.
244	77	Annexure 8 - Scope of Work	47. Onsite/Offsite Resources	47.8. The billing of onsite support will be commenced after successful project sign-off/acceptance. However, selected bidder has to ensure that onsite resource should be part of the project implementation team.	From which stage of the project implementation, the support onsite resources are expected to join? And how many ?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
245	77	Annexure 8 - Scope of Work	47. Onsite/Offsite Resources	47.10. Response Time and Meantime to Restore [MTTR] 47.10.1. Response Time shall be 2 hours and MTTR shall be 4 hours.	MTTR / response time is driven by the support model with assistance from the product support team when needed. Is this alignment part of the future support plan?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
246	79	Annexure 9 - Functional and Technical Requirements		Compliance - Description - Marks A - Already Available FULLY in the product - 2 B - Not Available but can be provided. Should be included in the version of the product being supplied before implementation. (Free of charge) - 1.5 C - Functionality requires customization of the product - 1 D - Not Feasible in the product due to architecture or structural limitations - 0	Generally SAAS CRM products provides framework to implement business processes as per bank's requirement. Which requires some level of configuration to be done on Bank's CRM instance. It requires efforts and cost. In these cases we think Option B is more appropriate to use. Please confirm our understanding	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



247	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	1. Consolidated single customer 360 screen with all the data about the customer from across the platforms such as CBS, Other Allied Systems, MIS/ Data Warehouse, IVR, email, SMS gateway etc.	The in-house application details is needed to size our efforts and commercials. In order to get that, can the NDA be signed prior to Bid submission?	Currently, Bank is having 50+ source systems. Bidder to comply with RFP terms and conditions.
248	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	1. Consolidated single customer 360 screen with all the data about the customer from across the platforms such as CBS, Other Allied Systems, MIS/ Data Warehouse, IVR, email, SMS gateway etc.	Which CBS currently the Bank is using? Does all the data resides in Data Warehouse? What are other Allied Systems?	Currently, Bank is using Flexcube. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
249	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	1. Consolidated single customer 360 screen with all the data about the customer from across the platforms such as CBS, Other Allied Systems, MIS/ Data Warehouse, IVR, email, SMS gateway etc.	Which all data points would you like MoEngage to get data from? i.e. CRM, Datalake etc. Please identify all the tools and list down the kind of data you would like us to get from these tools.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
250	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	1. Consolidated single customer 360 screen with all the data about the customer from across the platforms such as CBS, Other Allied Systems, MIS/ Data Warehouse, IVR, email, SMS gateway etc.	Total Contactable Database	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
251	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	1. Consolidated single customer 360 screen with all the data about the customer from across the platforms such as CBS, Other Allied Systems, MIS/ Data Warehouse, IVR, email, SMS gateway etc.	Is it fair to assume REST API access is supported in CBS, "allied systems" etc outlined here?	Yes. Bidder to comply with RFP terms and conditions.
252	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	1. Consolidated single customer 360 screen with all the data about the customer from across the platforms such as CBS, Other Allied Systems, MIS/ Data Warehouse, IVR, email, SMS gateway etc.	Which functionalities/processes in CBS & allied systems need to be integrated in CRM? Is it fair for the vendor to share best practices and assume a 1-way or bidirectional interfaces with each of these systems , or do you have a defined vision that vendors need to align to ?	All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.



253	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>1. Consolidated single customer 360 screen with all the data about the customer from across the platforms such as CBS, Other Allied Systems, MIS/ Data Warehouse, IVR, email, SMS gateway etc.</p>	<p>Who are the personas using the CRM system and which channels will be used - will CRM be a common system across bank premises, contact center, social media team etc?</p>	<p>Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.</p>
254	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>2. Detailed View of customer's information like</p> <ul style="list-style-type: none"> <li>• Profile (name, demography, address, KYC details etc.)</li> <li>• Account's both joint and individuals.</li> <li>• Deposits, Loans etc.,</li> <li>• Third Party Products (tax payment status, Insurance, Mutual Fund, DEMAT etc.),</li> <li>• Cards details like how many cards, debit/credit, closure/ renewal, Pin change options, willingness of new card etc.</li> <li>• Channel Services (Net Banking, Mobile Banking, etc.).</li> <li>• CMR solution should also have the ability to identify the customers and their relationship with other customers in a single click.</li> </ul>	<p>what is / are the data sources for these objects? Any security requirements for these?</p>	<p>RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.</p>



255	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>2. Detailed View of customer's information like</p> <ul style="list-style-type: none"> <li>• Profile (name, demography, address, KYC details etc.)</li> <li>• Account's both joint and individuals.</li> <li>• Deposits, Loans etc.,</li> <li>• Third Party Products (tax payment status, Insurance, Mutual Fund, DEMAT etc.),</li> <li>• Cards details like how many cards, debit/credit, closure/ renewal, Pin change options, willingness of new card etc.</li> <li>• Channel Services (Net Banking, Mobile Banking, etc.).</li> <li>• CMR solution should also have the ability to identify the customers and their relationship with other customers in a single click.</li> </ul>	Kindly provide details of the third party platforms referred here.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
256	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>2. Detailed View of customer's information like</p> <ul style="list-style-type: none"> <li>• Profile (name, demography, address, KYC details etc.)</li> <li>• Account's both joint and individuals.</li> <li>• Deposits, Loans etc.,</li> <li>• Third Party Products (tax payment status, Insurance, Mutual Fund, DEMAT etc.),</li> <li>• Cards details like how many cards, debit/credit, closure/ renewal, Pin change options, willingness of new card etc.</li> <li>• Channel Services (Net Banking, Mobile Banking, etc.).</li> <li>• CMR solution should also have the ability to identify the customers and their relationship with other customers in a single click.</li> </ul>	May we request clarification on whether the vendor needs to integrate with any third-party systems to capture the required data? If so, could you please provide information on the third-party systems that need to be taken into consideration for integrations in this situation?	All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.



258	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>2. Detailed View of customer's information like</p> <ul style="list-style-type: none"> <li>• Profile (name, demography, address, KYC details etc.)</li> <li>• Account's both joint and individuals.</li> <li>• Deposits, Loans etc.,</li> <li>• Third Party Products (tax payment status, Insurance, Mutual Fund, DEMAT etc.),</li> <li>• Cards details like how many cards, debit/credit, closure/ renewal, Pin change options, willingness of new card etc.</li> <li>• Channel Services (Net Banking, Mobile Banking, etc.).</li> <li>• CMR solution should also have the ability to identify the customers and their relationship with other customers in a single click.</li> </ul>	<p>1. Which system is used as single source of truth for Customer profile data? Are the API's available on Bank's ESB?</p> <p>2. How many and which systems has account data for Deposits, Loans etc?</p> <p>3. Which system has Third Party products data? Are all third party data available in one single system or multiple? Please provide list of systems which holds Third Party Products data</p> <p>4. Is bank maintaining Cards data in the same systems for Deposite, Loans? If not please provide system details</p> <p>5. What mean by CMR solution? Please explain</p>	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
259	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>2. Detailed View of customer's information like</p> <ul style="list-style-type: none"> <li>• Profile (name, demography, address, KYC details etc.)</li> <li>• Account's both joint and individuals.</li> <li>• Deposits, Loans etc.,</li> <li>• Third Party Products (tax payment status, Insurance, Mutual Fund, DEMAT etc.),</li> <li>• Cards details like how many cards, debit/credit, closure/ renewal, Pin change options, willingness of new card etc.</li> <li>• Channel Services (Net Banking, Mobile Banking, etc.).</li> <li>• CMR solution should also have the ability to identify the customers and their relationship with other customers in a single click.</li> </ul>	List the number of system that needs to be integrated for Customer 360?	Currently, Bank is having 50+ source systems. Bidder to comply with RFP terms and conditions.



260	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	4. Display list of complaints and service requests with status. It should have details of all pending and resolved Service Requests & Complaints via any channel.	1. Which system is currently used by Bank for "complaints and service requests" 2. Is bank going to decommission "Complaints and Service requests" system and use proposed CRM application?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
261	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	4. Display list of complaints and service requests with status. It should have details of all pending and resolved Service Requests & Complaints via any channel.	Does the bank have any existing tool or mechanism for complaints and service? What all channels are used to get customers complaints	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
262	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	4. Display list of complaints and service requests with status. It should have details of all pending and resolved Service Requests & Complaints via any channel.	Please provide the channels from were the service requests flow from. The cost of the Tools/ Systems/ APIs/ Connector will be borne by Canara Bank.	Bidder to comply with RFP terms and conditions.
263	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	5. Capability to drill down the customer details from 360 View to detailed view screens.	Is there any difference in the details shown both views(360 and details screens)	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
264	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	7. Option to create any number of new custom fields in Customer 360 main screen and sub screen with provision to add custom validation logic by the administrators	Field limit is present. Validation logic not possible.	Bidder to comply with RFP terms and conditions.
265	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	8. Capability to configure Cross Sell/Upsell option in Customer 360 screen based on logic set by Bank to show as Alert or Pop UP or for push notification /Campaign Activity/ KYC pending etc.	Need more context	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
266	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	8. Capability to configure Cross Sell/Upsell option in Customer 360 screen based on logic set by Bank to show as Alert or Pop UP or for push notification /Campaign Activity/ KYC pending etc.	Does bank use any tool/DW today to recommend the NBO for a customer?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
267	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	8. Capability to configure Cross Sell/Upsell option in Customer 360 screen based on logic set by Bank to show as Alert or Pop UP or for push notification /Campaign Activity/ KYC pending etc.	How the Bank is coming up with Cross sell / upsell offers currently? are these rule based on AI/ML model recommendation?	Both rule based and AI/ML model are required



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268	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	9. Search Option/Filter options from the Customer Database using any of the customer data field (Advanced Find) & ability to export the result set to different formats like excel, pdf etc.	Is there any existing service in place to perform the search in CRM from the customer database? Do you have any report and analytics system in place?	Bidder to comply with RFP terms and conditions.
269	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	10. Capability to show alert/notification as Pop Up on Customer 360 screen for each contact/customer (in 360 View) For any digital journey drop off.	Is it safe to assume that the digital apps/websites the customer is accessing, will provide necessary information in order to generate the alerts/notifications? if yes, in which format it will be available?	Yes, through API calls
270	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	10. Capability to show alert/notification as Pop Up on Customer 360 screen for each contact/customer (in 360 View) For any digital journey drop off.	More details please	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
271	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	12. Capability to generate Customer Profitability Index for each Customer in Customer Database.	CPI logic?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
272	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	12. Capability to generate Customer Profitability Index for each Customer in Customer Database.	What are the parameters used by the Bank for calculating the Profitability Index? Is it safe to assume that the calculations happens in other system and the CRM should be able to fetch and display? Please elaborate?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
273	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	12. Capability to generate Customer Profitability Index for each Customer in Customer Database.	Please provide procedure/rules/formula for generating "Customer Profitability Index"	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
274	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	12. Capability to generate Customer Profitability Index for each Customer in Customer Database.	Which IVR Blast service tool is currently being used by Bank?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
275	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	12. Capability to generate Customer Profitability Index for each Customer in Customer Database.	Does Bank use any AI/ML model today or does the proposed solution should have the capability to do that to achieve the mentioned functionality?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
276	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	12. Capability to generate Customer Profitability Index for each Customer in Customer Database.	Please provide data requirement & logic for the calculation?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
277	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	13. Capability to integrate Interactive voice response blast services.	where is this stored?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



278	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	13. Capability to integrate Interactive voice response blast services.	Request Bank to elaborate on this requirement?	Bank expects the proposed solution to integrate IVRS with CRM
279	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	13. Capability to integrate Interactive voice response blast services.	What is the current CTI being used at bank. Is it fair to assume that CTI infrastructure will be same going forward?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
280	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	13. Capability to integrate Interactive voice response blast services.	Need more context	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
281	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	13. Capability to integrate Interactive voice response blast services.	Which system is being used for the service - e.g., a CTI system like Genesys? Shall we assume that the CRM system the IVR will integrate with CRM for anything that needs CRM data and any IVR changes may not be included in scope?	IVR Genesis
282	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	13. Capability to integrate Interactive voice response blast services.	Is this more so from a platform capability (e.g. how to use the system rather than Canara Bank CRM perspective)? For e.g. the specific attribute is coming from CBS and CRM will not allow any updates to the attribute through CRM itself.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
283	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	13. Capability to integrate Interactive voice response blast services.	How many business processes are supported/to be integrated with IVR?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
284	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	13. Capability to integrate Interactive voice response blast services.	Will it be real time integration? What kind of data need to be captured?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
285	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	14. Bank should be able to use the Meta data to inform engagement strategies, customer journey steps, communications etc. A Customer 360 view should enable organization to derive value, achieve sustainable competitive advantage, and maximize new customer acquisition opportunities whether in-store or online.	Need more context	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



Replies to Prebid Queries for GEM/2023/B/3283751 dated 29/03/2023 for Selection of vendor for end to end implementation of comprehensive Customer Relationship Management (CRM) solution for 5 years

286	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	14. Bank should be able to use the Meta data to inform engagement strategies, customer journey steps, communications etc. A Customer 360 view should enable organization to derive value, achieve sustainable competitive advantage, and maximize new customer acquisition opportunities whether in-store or online.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
287	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	14. Bank should be able to use the Meta data to inform engagement strategies, customer journey steps, communications etc. A Customer 360 view should enable organization to derive value, achieve sustainable competitive advantage, and maximize new customer acquisition opportunities whether in-store or online.	We understand that the Customer Lifetime Value on customer 360 will suffice the requirement. Please confirm	Bidder to comply with RFP terms and conditions.
288	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	15. The bidder should provide videos/ documents/ tech support/ chat-bot among others to guide the customers to use & interact with CRM.	We understand that bank already has a chatbot to support the asked requirement. If required, the proposed CRM will leverage the same by integrating.	Yes
289	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	15. The bidder should provide videos/ documents/ tech support/ chat-bot among others to guide the customers to use & interact with CRM.	virtual or agent based chatbot?	The bidder should integrate the Bank's chatbot to proposed CRM solution
290	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	15. The bidder should provide videos/ documents/ tech support/ chat-bot among others to guide the customers to use & interact with CRM.	Could you kindly clarify the specific expectations from the bidder in this situation? Additionally, does the bank require a chatbot solution from the bidder?	The bidder should integrate the Bank's chatbot to proposed CRM solution
291	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	15. The bidder should provide videos/ documents/ tech support/ chat-bot among others to guide the customers to use & interact with CRM.	Customer means User of CRM ? Or Bank's customer?	Both users and customers/ consumers
292	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	16. Improve the quality of data that feeds data analytics and machine learning initiatives, making downstream decisions more precise.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



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293	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	16. Improve the quality of data that feeds data analytics and machine learning initiatives, making downstream decisions more precise.	Need more context	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
294	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	16. Improve the quality of data that feeds data analytics and machine learning initiatives, making downstream decisions more precise.	Do you have any MDM and BI system in place which can be integrated with CRM?Is it possible to get details on the existing system.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
295	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	17. Feedback management should be integrated with the bank's existing systems on branch-level/administrative level to improve customer experience.	Is it fair to assume that existing feedback management system can trigger the feedback request and capture the feedback response? If so is it fair to assume the existing feedback management systems exposes services/API for realtime and batch integration that can be leveraged and all the feedback related services are taken care by existing systems	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
296	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	17. Feedback management should be integrated with the bank's existing systems on branch-level/administrative level to improve customer experience.	Are bank existing systems enable feedback orchestration (e.g. deliver feedback ) ? Is CRM envisioned to provide capability to initiate and view feedback and not orchestrate it (e.g. ask for feedback through an email, and generate a link for feedback)?  Do you want the CRM system to enable an external facing feedback collection page (if web is indeed a channel for feedback gathering)	Bank expects that Feedback Management system should be integrated with Bank's system/channel at branch/administrative level
297	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	17. Feedback management should be integrated with the bank's existing systems on branch-level/administrative level to improve customer experience.	This will be an additional step as part of customer interaction process. However is there any explicit requirements around feedback management then please explain.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
298	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	17. Feedback management should be integrated with the bank's existing systems on branch-level/administrative level to improve customer experience.	What is the process of obtaining feedback from the customer, email/sms/others. If feedback for all stages or only once the journey is complete	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
299	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	17. Feedback management should be integrated with the bank's existing systems on branch-level/administrative level to improve customer experience.	Does Bank already have Feedback Management solution? Which solution Bank uses? Or is it expected the Bidder to provide feedback management as part of the solution?	The proposed solution must have Feedback Management solution



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300	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	17. Feedback management should be integrated with the bank's existing systems on branch-level/administrative level to improve customer experience.	Could you kindly provide clarification on which existing bank systems need to be taken into consideration for integration related to feedback management?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
301	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	17. Feedback management should be integrated with the bank's existing systems on branch-level/administrative level to improve customer experience.	Which Feedback Management tool is being used by bank? Is the same tool used to record feedback for customer service?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
302	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	18. The bidder should be able to provide the 360-degree customer feedback mechanism to the customer at the various levels. The system should provide multiple channel to receive the feedback from the customer such as QR code, tickets, SMS, emails, telephone etc. The system should also be customized as per the requirement of the bank.	Is it fair to assume that solution need s to integrate with the QR code system and SMS & Email gateway systems.	Yes
303	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	18. The bidder should be able to provide the 360-degree customer feedback mechanism to the customer at the various levels. The system should provide multiple channel to receive the feedback from the customer such as QR code, tickets, SMS, emails, telephone etc. The system should also be customized as per the requirement of the bank.	Should social media platforms also be taken into consideration for integrations in this situation? If so, which are the specific social media platforms that need to be considered for this project?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
304	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	18. The bidder should be able to provide the 360-degree customer feedback mechanism to the customer at the various levels. The system should provide multiple channel to receive the feedback from the customer such as QR code, tickets, SMS, emails, telephone etc. The system should also be customized as per the requirement of the bank.	where is QR code exposed?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



305	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	18. The bidder should be able to provide the 360-degree customer feedback mechanism to the customer at the various levels. The system should provide multiple channel to receive the feedback from the customer such as QR code, tickets, SMS, emails, telephone etc. The system should also be customized as per the requirement of the bank.	As per our understanding, Bank will provide the link for capturing feedback from QR code, email, SMS, the proposed new CRM will leverage the same by integrating to fetch and capture the response in the application. CRM will expose the API's to the bank which will be consumed to capture the required information.  Kindly confirm	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
306	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	18. The bidder should be able to provide the 360-degree customer feedback mechanism to the customer at the various levels. The system should provide multiple channel to receive the feedback from the customer such as QR code, tickets, SMS, emails, telephone etc. The system should also be customized as per the requirement of the bank.	Do need a Feedback System or are you looking to integrate with existing one? If yes, which is the existing feedback system? In case of new feedback system we would need to know the monthly responses expected to size the same	Bank expects that Feedback Management system should be integrated with Bank's system/channel at branch/administrative level
307	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	19. CRM should be able to identify service requests /complaints made by the same customer for any issue even after complaining through different channels. These are to be categorized as escalations of the same case and further De-duplication check on Service Request.	Which are the different channels that need to be taken into consideration for ticket creation?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
308	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	19. CRM should be able to identify service requests /complaints made by the same customer for any issue even after complaining through different channels. These are to be categorized as escalations of the same case and further De-duplication check on Service Request.	different types of Service requests?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



309	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	19. CRM should be able to identify service requests /complaints made by the same customer for any issue even after complaining through different channels. These are to be categorized as escalations of the same case and further De-duplication check on Service Request.	is this a view only request? Will the complaints be handled and resolved on CRM? Or is there a different Service Tool? Need Clarity	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
310	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	20. Bidder has to provide detailed Customer Assessment review and recommendations for mobile/ web platform and submit report with recommendations and suggested solutions. The report will cover the following items such as Performance insights, Community feedback, Customer view, Competitive Benchmarking, User Interactions Impact analysis, New User Acquisition, Login Experience, Feature experience, Ease of use, Wireframe analysis, New feature Ideas, Improving UI Accessibility, Improving user adoption through UX etc.	Kindly specify the objective and expectations from the asked requirement.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
311	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	20. Bidder has to provide detailed Customer Assessment review and recommendations for mobile/ web platform and submit report with recommendations and suggested solutions. The report will cover the following items such as Performance insights, Community feedback, Customer view, Competitive Benchmarking, User Interactions Impact analysis, New User Acquisition, Login Experience, Feature experience, Ease of use, Wireframe analysis, New feature Ideas, Improving UI Accessibility, Improving user adoption through UX etc.	Is there a Customer Portal / Customer DIY Journey part of scope or not? If yes, we would need to know how many authenticated users login are expected in a month to size it right.	The proposed solution should have AI/ML capability. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



312	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	20. Bidder has to provide detailed Customer Assessment review and recommendations for mobile/ web platform and submit report with recommendations and suggested solutions. The report will cover the following items such as Performance insights, Community feedback, Customer view, Competitive Benchmarking, User Interactions Impact analysis, New User Acquisition, Login Experience, Feature experience, Ease of use, Wireframe analysis, New feature Ideas, Improving UI Accessibility, Improving user adoption through UX etc.	Since this a global standard SAAS product with in built mobility features and the below requirement would only be suitable for new App deveopment,is it right to assume that this will not be required.	Bidder to comply with RFP terms and conditions.
313	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	20. Bidder has to provide detailed Customer Assessment review and recommendations for mobile/ web platform and submit report with recommendations and suggested solutions. The report will cover the following items such as Performance insights, Community feedback, Customer view, Competitive Benchmarking, User Interactions Impact analysis, New User Acquisition, Login Experience, Feature experience, Ease of use, Wireframe analysis, New feature Ideas, Improving UI Accessibility, Improving user adoption through UX etc.	Request the Bank to Elaborate on this requirement.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



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314	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>21. Bidder should extract/load Data from all Source systems to a custom dashboard as per the requirement of our bank in the portal for the bank, the dashboard developed is not limited to:</p> <p>The admin module/dashboard of the solution provided to the bank should have real-time analytics on various metrics like Stage wise applications, TAT (within, outside the bounds, escalated, etc.), product wise, loan quantum wise, risk profile wise, STP/non STP, Customer Life Time Value Calculation etc. The reports thus generated should be downloadable / exportable.</p>	<p>what are the details of Source Systems? What is the data volume? What is the Consumer Count &amp; its related data volume?</p>	<p>Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.</p>
315	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>21. Bidder should extract/load Data from all Source systems to a custom dashboard as per the requirement of our bank in the portal for the bank, the dashboard developed is not limited to:</p> <p>The admin module/dashboard of the solution provided to the bank should have real-time analytics on various metrics like Stage wise applications, TAT (within, outside the bounds, escalated, etc.), product wise, loan quantum wise, risk profile wise, STP/non STP, Customer Life Time Value Calculation etc. The reports thus generated should be downloadable / exportable.</p>	<p>Is there any analytical tool currently Bank is using? If not, is Bank open to use recommended analytics tool for custom reporting/dashboards /UI etc?</p>	<p>The proposed solution should have AI/ML capability. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.</p>



316	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>21. Bidder should extract/load Data from all Source systems to a custom dashboard as per the requirement of our bank in the portal for the bank, the dashboard developed is not limited to:</p> <p>The admin module/dashboard of the solution provided to the bank should have real-time analytics on various metrics like Stage wise applications, TAT (within, outside the bounds, escalated, etc.), product wise, loan quantum wise, risk profile wise, STP/non STP, Customer Life Time Value Calculation etc. The reports thus generated should be downloadable / exportable.</p>	<p>Requesting further clarification on this requirement, please? Specifically, which portal is being referred to, and does the bidder need to integrate with the bank's portal? Additionally, could you kindly provide more information on the various source systems that need to be considered for the purpose of data extraction?</p>	<p>One of the source systems is Datawarehouse. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.</p>
317	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>21. Bidder should extract/load Data from all Source systems to a custom dashboard as per the requirement of our bank in the portal for the bank, the dashboard developed is not limited to:</p> <p>The admin module/dashboard of the solution provided to the bank should have real-time analytics on various metrics like Stage wise applications, TAT (within, outside the bounds, escalated, etc.), product wise, loan quantum wise, risk profile wise, STP/non STP, Customer Life Time Value Calculation etc. The reports thus generated should be downloadable / exportable.</p>	<p>Are we talking about data migration from core systems to CRM and providing a dashboard in CRM here? To which portal the data needs to be loaded? From how many system the data needs to be extracted? Generally Data Extraction is done by the Bank and provided the same for CRM migration, is it safe to assume that the Bank will do the same? What is volume of the Data that needs to be loaded in CRM?</p>	<p>Bank would like to clarify that it is not data migration, it is bidirectional integration with source systems for fetching and keeping the data required for CRM solution. Bidder to comply with RFP terms and conditions.</p>



318	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>21. Bidder should extract/load Data from all Source systems to a custom dashboard as per the requirement of our bank in the portal for the bank, the dashboard developed is not limited to:</p> <p>The admin module/dashboard of the solution provided to the bank should have real-time analytics on various metrics like Stage wise applications, TAT (within, outside the bounds, escalated, etc.), product wise, loan quantum wise, risk profile wise, STP/non STP, Customer Life Time Value Calculation etc. The reports thus generated should be downloadable / exportable.</p>	<p>Could you please list down all possible source system details along with nature of data which needs to be extracted and loaded in dashboards?</p>	<p>One of the source systems is Datawarehouse. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.</p>
319	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>21. Bidder should extract/load Data from all Source systems to a custom dashboard as per the requirement of our bank in the portal for the bank, the dashboard developed is not limited to:</p> <p>The admin module/dashboard of the solution provided to the bank should have real-time analytics on various metrics like Stage wise applications, TAT (within, outside the bounds, escalated, etc.), product wise, loan quantum wise, risk profile wise, STP/non STP, Customer Life Time Value Calculation etc. The reports thus generated should be downloadable / exportable.</p>	<p>What is the current tool for dashboards and does bank intend to seek a new reporting tool or integrate with the existing one ?</p>	<p>RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.</p>



320	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	<p>21. Bidder should extract/load Data from all Source systems to a custom dashboard as per the requirement of our bank in the portal for the bank, the dashboard developed is not limited to:</p> <p>The admin module/dashboard of the solution provided to the bank should have real-time analytics on various metrics like Stage wise applications, TAT (within, outside the bounds, escalated, etc.), product wise, loan quantum wise, risk profile wise, STP/non STP, Customer Life Time Value Calculation etc. The reports thus generated should be downloadable / exportable.</p>	Are you referring to creating reports in existing portal? Or, is this envisioned to be a new portal on top of CRM system that will be exposed to bank external users?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
321	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	22. The system should have capability to interface with Bank's existing analytics/MIS/ DATA WAREHOUSE platform for seamless flow of data.	Which Analytical system is being used currently by the Bank?	The proposed solution should have AI/ML capability. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
322	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	22. The system should have capability to interface with Bank's existing analytics/MIS/ DATA WAREHOUSE platform for seamless flow of data.	Which Analytics /MIS/Data Warehouse sytem is being used by bank? What kind of data exchange is expected to and from CRM?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
323	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	22. The system should have capability to interface with Bank's existing analytics/MIS/ DATA WAREHOUSE platform for seamless flow of data.	Please specify the current data warehouse system of bank which needs to be integrated with.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
324	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	22. The system should have capability to interface with Bank's existing analytics/MIS/ DATA WAREHOUSE platform for seamless flow of data.	Integration. We can say yes for now considering the fact that they provide APIs and also technical feasibility is done but we need to understand why do they want to show it within the CRM and what reports are they trying to pull?	Bidder to comply with RFP terms and conditions.
325	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	23. Plugin/Interface to integrate with Social Media Platforms (Facebook, Twitter, Instagram etc.) from Customer 360.	What is expected in these plugins? Is there any existing Bank tool that would be leveraged here to support social listening capabilities?	Bidder to comply with RFP terms and the necessary plugin/interface to be provided



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326	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	23. Plugin/Interface to integrate with Social Media Platforms (Facebook, Twitter, Instagram etc.) from Customer 360.	Are you expecting any other social media channels to be integretd with CRM apart from Facebook, Twitter, Informatica? What kind of data are you expecting to include on Customer dashboard? Please provide sample data	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
327	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	23. Plugin/Interface to integrate with Social Media Platforms (Facebook, Twitter, Instagram etc.) from Customer 360.	Is Social Media Listening also required? Is there an existing system for Social Media management?	Bidder to comply with RFP terms and conditions.
328	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View	24. The system should have the capability of deduplication of leads received in the system from all sources. The logic to be defined in co-ordination with the Bank team.	What is the existing process of Lead creation to qualify? Lead creation thru Government Website, If Integration allowed or Website BOT required? What is the existing process of Lead to Opportunity? What are the parameter to identify Lead duplicate?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
329	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View		Please specify the systems which need to bring the customer 360 data	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
330	79	Annexure 9 - Functional and Technical Requirements	A. Customer 360 View		Please share the details of source system / destination system from where the data will be extracted /loaded and will bank share the different screen layout types from where data will be populated in the dashboard	One of the source systems is Datawarehouse. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



331	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	<p>1. Segmentation and targeting of customer groups: CRM software should be able to segment customers into groups according to a wide range of characteristics, such as demographics (e.g., age, geographic location, job role, industry, company size) and activities (e.g., recent and past purchases, email response rates, social media activity, personal preferences). The information derived should enable us to create a very defined customer profiles and then personalize their marketing messages to target very specific groups of customers. Marketers can also create targeted business-to-business email marketing campaigns, which can increase subscriber numbers, email marketing metrics.</p>	<p>Can we assume that the Segmentation will be done in CRM based on the customer details which are stored in CRM?</p>	<p>RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.</p>
332	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	<p>1. Segmentation and targeting of customer groups: CRM software should be able to segment customers into groups according to a wide range of characteristics, such as demographics (e.g., age, geographic location, job role, industry, company size) and activities (e.g., recent and past purchases, email response rates, social media activity, personal preferences). The information derived should enable us to create a very defined customer profiles and then personalize their marketing messages to target very specific groups of customers. Marketers can also create targeted business-to-business email marketing campaigns, which can increase subscriber numbers, email marketing metrics.</p>	<p>In the near future, is the bank anticipating the use of SMS, WhatsApp, and Telegram channels for marketing campaigns?</p>	<p>Yes. Bidder to comply with RFP terms and conditions.</p>



333	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	<p>1. Segmentation and targeting of customer groups: CRM software should be able to segment customers into groups according to a wide range of characteristics, such as demographics (e.g., age, geographic location, job role, industry, company size) and activities (e.g., recent and past purchases, email response rates, social media activity, personal preferences). The information derived should enable us to create a very defined customer profiles and then personalize their marketing messages to target very specific groups of customers. Marketers can also create targeted business-to-business email marketing campaigns, which can increase subscriber numbers, email marketing metrics.</p>	<p>Does the bank have any existing tool or mechanism for creating customer group and for marketing .</p>	<p>Bidder to comply with RFP terms and conditions.</p>
334	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	<p>1. Segmentation and targeting of customer groups: CRM software should be able to segment customers into groups according to a wide range of characteristics, such as demographics (e.g., age, geographic location, job role, industry, company size) and activities (e.g., recent and past purchases, email response rates, social media activity, personal preferences). The information derived should enable us to create a very defined customer profiles and then personalize their marketing messages to target very specific groups of customers. Marketers can also create targeted business-to-business email marketing campaigns, which can increase subscriber numbers, email marketing metrics.</p>	<p>Is business-to-business customers are managed under single MoEngage Campaign Management Application Dashboard or seperate Dashboard will be used for B2B?</p>	<p>Bidder to comply with RFP terms and conditions.</p>



335	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	<p>2. Creation of personalized content: CRM software should provide ability to customize communications to each person contacted. People dislike impersonal marketing messages that begin with generic introductions like "Dear customer." CRM software should create communications that address potential and current customers by name. CRM can also include the customer's position and company to truly tailor the message and grab their attention. Having other information about the customer, such as their purchasing history and preferences, as well as notes on previous communications, allows to craft a message tailored to each customer. For example, It could discuss ideas and opportunities, provide useful and helpful information, and guide the conversation to suit a specific customer. This level of personalized content results in increased response</p>	<p>Is PII Data such as First Name, Last Name be hosted Campaign Manager cloud or do we need make an API call to fetch the Personalization Parameters such as First Name, Last Name in real-time during the campaign execution?</p>	<p>Customer ID will be stored on cloud in encrypted format which is non-inclusive of PII data. Bank will decide the logic for cipher to encrypt the Customer ID/Customer IC. Bidder to comply with RFP terms and conditions.</p>
336	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	<p>2. Creation of personalized content: CRM software should provide ability to customize communications to each person contacted. People dislike impersonal marketing messages that begin with generic introductions like "Dear customer." CRM software should create communications that address potential and current customers by name. CRM can also include the customer's position and company to truly tailor the message and grab their attention. Having other information about the customer, such as their purchasing history and preferences, as well as notes on previous communications, allows to craft a message tailored to each customer. For example, It could discuss ideas and opportunities, provide useful and helpful information, and guide the conversation to suit a specific customer. This level of personalized content results in increased response</p>	<p>what all interfaces/channels required to integrate to obtain all information's ?</p>	<p>All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.</p>



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337	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	3. Ability to create targeted marketing campaign by segmenting the audience (based on demographics, product interest, and so on) as well as designing messages and offers for each group.	Are these only central driven campaigns or regional as well. In case of regional will it require sync with any central campaigns Are there any external party involved in campaigns	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
338	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	4. Ability to execute campaigns in Email/SMS/Social Media Channels etc.	Would you like MoEngage to take care of end to end email delivery as well? (i.e. Domain Reputation, IP Reputation Management, Dedicated IPs, IP Warm up, Inbox Placement etc.) OR Would you continue using your own ESP?	Bidder has to ensure smooth integration of proposed CRM solution with Bank's existing Email/SMS/Social Media Channels etc. Bidder to comply with RFP terms and conditions.
339	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	4. Ability to execute campaigns in Email/SMS/Social Media Channels etc.	Which social media platforms need to be taken into consideration as part of this project?	Bidder must take into consideration all the existing channels that Bank is currently using as well as for future engagements if any
340	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	4. Ability to execute campaigns in Email/SMS/Social Media Channels etc.	Is PII Data such as Email Address, Mobile Number be hosted on Campaign Manager cloud or do we need to propose PII Tokenization solution? What's the total number of emails sent on a monthly basis?	Customer ID will be stored on cloud in encrypted format which is non-inclusive of PII data. Bank will decide the logic for cipher to encrypt the Customer ID/Customer IC. Bidder to comply with RFP terms and conditions.
341	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	5. Ability to integrate with Social Media Platforms like Facebook, LinkedIn, Instagram, Twitter etc.,	Linkedin and Twitter not possible	Bidder to comply with RFP terms and conditions.
342	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	6. Ability to integrate with bank's existing IVR Solution to run an Outbound Call campaign from CRM. And marking the campaign response in real time mode.	What is the current IVR solution being used at Canara Bank?	Currently, Bank is using Genesis IVR solutions
343	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	6. Ability to integrate with bank's existing IVR Solution to run an Outbound Call campaign from CRM. And marking the campaign response in real time mode.	What is the current IVR system for Bank?	Currently, Bank is using Genesis IVR solutions
344	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	6. Ability to integrate with bank's existing IVR Solution to run an Outbound Call campaign from CRM. And marking the campaign response in real time mode.	how many product lines? Levels?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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345	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	7. Ability to capture the campaign reach and spread. Ability to track campaign response from the users using a variety of metrics - such as count of e-mail pushed, delivered count, mail opened /attachment opened count, responded count, lead generated etc. Track leads and contacts and tie them to a campaign source, and also tie every source to a campaign dollar.	Could you provide additional information or clarification on the campaign dollar requirement? we would appreciate a more detailed explanation of this particular requirement	Bidder to refer Corrigendum-2.
346	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	10. Ability to convert the campaign response to Lead manually as well as automatically	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
347	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	12. Reports of leads generated by social media campaigns.	Are we looking to integrate with bank existing social listening tool? If not , are we open to 3rd party solutions?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
348	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	12. Reports of leads generated by social media campaigns.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
349	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	12. Reports of leads generated by social media campaigns.	FB, Insta (to confirm about the bug)	Bidder to comply with RFP terms and conditions.
350	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	12. Reports of leads generated by social media campaigns.	The campaigns are only run via social media, will there be any other channel for campaigns. Are integrations required for any campaigns with external party. Is there a aggregator currently for social media	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
351	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	13. Complete track of all campaigns and submit the post evaluation for each campaign.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
352	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	14. Integrated campaign Management: A single place to effectively plan marketing spend, manage all initiatives and campaigns, and analyze performance and results.	Planning spends currently not possible	Bidder to comply with RFP terms and conditions.



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353	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	20. Ability to capture Budgeting & Costing part of a Campaign Execution.	Is there any req for Marketing budgets?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
354	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management	21. Ability to provide Standard Campaign Reports for different stages as well as to ability to generate reports by privileged CRM users directly from application GUI based on dynamics search condition.	Could you please provide further details or clarification regarding the GUI requirement?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
355	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management		How many customer facing properties does the bank have? Eg: Websites, Apps	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
356	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management		Are there any customer facing DIY journeys in scope?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
357	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management		Are there any customer banking mobile apps? What framework are those apps built on? Eg: Native (Android, iOS) or Hybrid (React Native, Cordova)	Yes, Bank is having mobile app. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
358	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management		Which IVR solution is the bank currently using?	Currently, Bank is using Genesis IVR solutions
359	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management		Attachment open counts of the attachments inside email cannot be viewed? Links inside an email can be tracked.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
360	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management		What are monthly volumes of email & SMS which are sent out of the system. What is the expected rate of growth?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
361	82	Annexure 9 - Functional and Technical Requirements	B. Campaign management		What is the volume of bank's customers & prospects? What is the expected rate of growth	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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362	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>2. Lead Capturing-CRM platform should be able to ensure that every lead is automatically fed into the Lead system from current source such as existing bank applications, internet banking, mobile banking, government websites such as e-NAM, calls, mail, message, ATM, social media (such as Facebook, twitter etc.) among other sources and preventing prospects from falling through the cracks. The ability to quickly import leads from offline sources.</p>	Kindly provide details of the third party platforms referred here.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
363	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>2. Lead Capturing-CRM platform should be able to ensure that every lead is automatically fed into the Lead system from current source such as existing bank applications, internet banking, mobile banking, government websites such as e-NAM, calls, mail, message, ATM, social media (such as Facebook, twitter etc.) among other sources and preventing prospects from falling through the cracks. The ability to quickly import leads from offline sources.</p>	API Integration, source code needed from the website	Bidder to use Bank's API Gateway for necessary integrations



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364	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>2. Lead Capturing-CRM platform should be able to ensure that every lead is automatically fed into the Lead system from current source such as existing bank applications, internet banking, mobile banking, government websites such as e-NAM, calls, mail, message, ATM, social media (such as Facebook, twitter etc.) among other sources and preventing prospects from falling through the cracks. The ability to quickly import leads from offline sources.</p>	<p>Please specify the list of sources which solution needs to integrate with to bring the leads to determine the integration effort.</p>	<p>All applications required for implementation of proposed CRM solution as per RFP should be integrated. Bidder to comply with RFP terms and conditions.</p>
365	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>2. Lead Capturing-CRM platform should be able to ensure that every lead is automatically fed into the Lead system from current source such as existing bank applications, internet banking, mobile banking, government websites such as e-NAM, calls, mail, message, ATM, social media (such as Facebook, twitter etc.) among other sources and preventing prospects from falling through the cracks. The ability to quickly import leads from offline sources.</p>	<p>Which of the existing bank applications need to be considered for lead generation and integrations? Also, is it limited to Facebook and Twitter only for considering social media platforms for lead generation? Additionally, which other government websites, apart from e-NAM, need to be taken into consideration for this project?</p>	<p>The proposed solution must integrate the identified applications/websites that the Bank considers for lead generation, not limited to current platforms.</p>



366	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	2. Lead Capturing-CRM platform should be able to ensure that every lead is automatically fed into the Lead system from current source such as existing bank applications, internet banking, mobile banking, government websites such as e-NAM, calls, mail, message, ATM, social media (such as Facebook, twitter etc.) among other sources and preventing prospects from falling through the cracks. The ability to quickly import leads from offline sources.	How many offline services to be considered for Lead Import? Are they having fixed format files? Could you please share the Lfile formats for various offline services?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
367	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	2. Lead Capturing-CRM platform should be able to ensure that every lead is automatically fed into the Lead system from current source such as existing bank applications, internet banking, mobile banking, government websites such as e-NAM, calls, mail, message, ATM, social media (such as Facebook, twitter etc.) among other sources and preventing prospects from falling through the cracks. The ability to quickly import leads from offline sources.	Does "Lead System" here refer to an integrating system? If yes, describe what the lead system will do beyond CRM lead management?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
368	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	3. Auto-response management: Automatically send personalized responses to Web site inquiries.	Which are the different channels that need to be taken into consideration for sending personalized responses in this situation?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
369	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	3. Auto-response management: Automatically send personalized responses to Web site inquiries.	What are the channels (Email, SMS etc) through which the auto responses needs to be sent?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
370	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	4. End User De-duplication: Option to configure de-duplication check on lead creation using business logic shared by the Bank based on any field in Lead Object in configurable mode.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



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371	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	6. Ability to attach and download documents by CRM users in any flow.	Kindly specify the flows where this functionality require .	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
372	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	6. Ability to attach and download documents by CRM users in any flow.	Which system does Bank plan to leverage for document management?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
373	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	6. Ability to attach and download documents by CRM users in any flow.	Is there a Document management system currently used by the Bank with which the integration needs to be done? Which DMS is being used? Or is it expected to store the documents in CRM itself?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
374	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	6. Ability to attach and download documents by CRM users in any flow.	Is there a DMS/Content management solution being used at bank today and will that be used for storing the documents going forward as well?	Bidder to provide necessary solution to meet the RFP requirement
375	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	8. Platform should have strong file level validation controls for size, type, and content. Files to be scanned for any malicious content through an antivirus.	Do you any application in place for malicious content identification	Bidder to comply with RFP terms and conditions.
376	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	8. Platform should have strong file level validation controls for size, type, and content. Files to be scanned for any malicious content through an antivirus.	Does the client have an exiting tool/anitvirus which can be used to scan the file for malicious content?	Bidder to comply with RFP terms and conditions.
377	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	8. Platform should have strong file level validation controls for size, type, and content. Files to be scanned for any malicious content through an antivirus.	Is there an existing antivirus implemented at SBICAP? Is Integration possible?	Bidder to comply with RFP terms and conditions.
378	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	8. Platform should have strong file level validation controls for size, type, and content. Files to be scanned for any malicious content through an antivirus.	Integration with third paty antivirus will be be required. The cost of the Tools/ Systems/ APIs/ Connector will be borne by Canara Bank.	Bidder to comply with RFP terms and conditions.



379	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
380	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	What is the specific expectation from the bidder in this clause?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



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381	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	<p>What is expected of CRM in this requirement? Could you please elaborate the requirement?</p>	<p>RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.</p>
382	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	<p>Total number of users targeted in a month for each of the channels you would like to move to MoEngage i.e. SMS, IVR, Whatsapp and any other channels?</p>	<p>Bidder to comply with RFP terms and conditions.</p>



383	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	Total number of communications sent on a monthly basis on these channels	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
384	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	Promotional Emails	Bidder to comply with RFP terms and conditions.



385	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	Promotional Whatsapp	Bidder to comply with RFP terms and conditions.
386	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	SMS	Bidder to comply with RFP terms and conditions.



387	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	Whatsapp	Bidder to comply with RFP terms and conditions.
388	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>10. Lead nurturing seeks to educate and demonstrate the value of the product/services through:</p> <p>A. Inbound Marketing– blogging, social media updates, social media engagement, premium content (eBooks, info-graphics, videos, webinars), calls-to-action, landing pages etc.</p> <p>B. Demand Generation– Channels like paid search (PPC), social media ads, native ads, email marketing, direct mail, print ads, media ads etc. can be used to get relevant leads for your business.</p>	Mobile Push	Bidder to comply with RFP terms and conditions.
389	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	<p>12. Lead queues: Automatically route leads to various branches, Regional offices, Circle Office, Marketing Offices etc. based on customized business rule.</p>	how many territories?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



390	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	12. Lead Enrichment: Once lead enter in our system it needs to be enriched so that it will be easy for bank employees to decide the viability of the loan. It can be done through collecting and presenting existing information such as Credit score, payment history etc. about the customer among other things.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
391	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	12. Lead Enrichment: Once lead enter in our system it needs to be enriched so that it will be easy for bank employees to decide the viability of the loan. It can be done through collecting and presenting existing information such as Credit score, payment history etc. about the customer among other things.	Is bank expecting to integrate with CIBIL to fetch Credit Score and Payment History? Are there any other external applications / services to be integrated with?	Bank is expecting integration with the external services/applications. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
392	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	12. Lead Enrichment: Once lead enter in our system it needs to be enriched so that it will be easy for bank employees to decide the viability of the loan. It can be done through collecting and presenting existing information such as Credit score, payment history etc. about the customer among other things.	Which System Integration is required for Lead Enrichment?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
393	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	13. Lead scoring functionality: Ability to mark scoring on leads generated for Customer/Non Customers. For example, leads scoring logic can be based on CUSTOMER PROFITABILITY INDEX/Customer Worth, Transaction history, Internal Rating, vintage criteria etc. for customers and for the Non Customers it can be based on previous interactions, on AI inputs, income criteria/profession/line of business, based on any field inputs etc.	What is the criteria Bank has in mind to calculate Customer Profitability Index?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



394	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	13. Lead scoring functionality: Ability to mark scoring on leads generated for Customer/Non Customers. For example, leads scoring logic can be based on CUSTOMER PROFITABILITY INDEX/Customer Worth, Transaction history, Internal Rating, vintage criteria etc. for customers and for the Non Customers it can be based on previous interactions, on AI inputs, income criteria/profession/line of business, based on any field inputs etc.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
395	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	13. Lead scoring functionality: Ability to mark scoring on leads generated for Customer/Non Customers. For example, leads scoring logic can be based on CUSTOMER PROFITABILITY INDEX/Customer Worth, Transaction history, Internal Rating, vintage criteria etc. for customers and for the Non Customers it can be based on previous interactions, on AI inputs, income criteria/profession/line of business, based on any field inputs etc.	Since this requires data analysis and data modelling will this be coming from existing data warehouse at bank or needs to be proposed as part of the solution?	Bidder has to provide as part of the proposed solution
396	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	13. Lead scoring functionality: Ability to mark scoring on leads generated for Customer/Non Customers. For example, leads scoring logic can be based on CUSTOMER PROFITABILITY INDEX/Customer Worth, Transaction history, Internal Rating, vintage criteria etc. for customers and for the Non Customers it can be based on previous interactions, on AI inputs, income criteria/profession/line of business, based on any field inputs etc.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



397	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	13. Lead scoring functionality: Ability to mark scoring on leads generated for Customer/Non Customers. For example, leads scoring logic can be based on CUSTOMER PROFITABILITY INDEX/Customer Worth, Transaction history, Internal Rating, vintage criteria etc. for customers and for the Non Customers it can be based on previous interactions, on AI inputs, income criteria/profession/line of business, based on any field inputs etc.	Is it fair to assume that proposed CRM solution should be able to integrate with the collection management system and provide insights for customer 360. A complete collection management being core functionality will be sitting in the CBS system and we need to integrate to that.	Proposed solution must contain Collection Management as part of CRM. Bidder to comply with RFP terms and conditions.
398	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	14. Ability to provide system generated Next Best Action prompt on leads based on ML/AI triggers, previous interactions, lead scoring, etc.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
399	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	15. Ability to convert a Lead into a Customer without re-entering the customer information captured during the prospecting stage.	Is customer to be created directly from lead?	Bidder has to facilitate seamless flow of relevant information from lead stage to customer creation stage through channel specific bank API gateway.
400	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	17. Ability to show customer interactions (happening from different channels like Email, SMS, Chat, Web-Site, IVR) of a lead in a single view of Lead Screen to bring an Omni Channel Experience	Is there a need for the bank to acquire a chatbot/WhatsApp bot? Additionally, what are the different chat platforms that need to be taken into consideration for this project? Alternatively, will this information be retrieved from the bank's system?	The bidder should integrate the Bank's chatbot to proposed CRM solution.
401	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	18. Ability to track lead using any of the lead identifiers such as Lead ID, Customer ID, Mobile Phone, Email etc.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
402	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	19. The entire lead generation process should be under scrutiny by CRM to ensure that it is as effective as possible in bringing new leads, converting them into customers and retaining them overtime. Different analytics tools can be used to optimize each step in the process and make strategic decisions to improve results.	Request Bank to Elaborate the requirement? What is expected by the CRM?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



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403	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	19. The entire lead generation process should be under scrutiny by CRM to ensure that it is as effective as possible in bringing new leads, converting them into customers and retaining them overtime. Different analytics tools can be used to optimize each step in the process and make strategic decisions to improve results.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
404	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	22. Lead Workflow: The ability to create tasks and alerts based on types of leads (e.g. Generate an email with relevant data for a lead from an important customer).	Does client wants vendor to follow any lead management lifecycle within CRM?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
405	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	21. Lead Campaign Mapping: The ability to track every lead back to a specific marketing campaign.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
406	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	23. Availability of Document Repository for Lead Module to be available for CRM user's like call centre agents/branch staff/sales executives with keyword based content tagging and search ability.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
407	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	23. Availability of Document Repository for Lead Module to be available for CRM user's like call centre agents/branch staff/sales executives with keyword based content tagging and search ability.	Which Document Management System is currently used in bank?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
408	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	27. Lead Life cycle defining in admin console Purging out and taking back up of old leads after pre decided time period by Admin.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
409	84	Annexure 9 - Functional and Technical Requirements	C. Lead management	28. TAT based escalation matrix for follow-up and conversion of leads.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
410	84	Annexure 9 - Functional and Technical Requirements	C. Lead management		Push App campaigns?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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411	84	Annexure 9 - Functional and Technical Requirements	C. Lead management		Assuming only retail customer journeys to be in scope. Please confirm	Bidder to comply with RFP terms and conditions.
412	84	Annexure 9 - Functional and Technical Requirements	C. Lead management		How many types of Leads are there? Are the lead process are different for each lead type?	Bidder to comply with RFP terms and conditions.
413	84	Annexure 9 - Functional and Technical Requirements	C. Lead management		Please help us with list of Products bank has?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
414	84	Annexure 9 - Functional and Technical Requirements	C. Lead management		Please list down channel for Omni channel support	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
415	84	Annexure 9 - Functional and Technical Requirements	C. Lead management		We are assuming that upon successful closure of Lead / opportunity the details will be sent to 'Account opening system' to onboard new customer. Verification/validation of the customer will happen on the 'Account Opening System'. Please confirm.	Yes
416	84	Annexure 9 - Functional and Technical Requirements	C. Lead management		Can we assume that there is only one system for 'Account Opening System'. If no please provide how many systems are currently used in bank for Account Opening	No. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
417	86	Annexure 9 - Functional and Technical Requirements	D. Opportunity Management	7. Similar Opportunities - provide ability for user to look up similar opportunities using a variety of search criteria	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
418	86	Annexure 9 - Functional and Technical Requirements	D. Opportunity Management	8. Product Catalogues: Map the different products to the prospect customer to convert the opportunity to a sale.	Please provide Sales catalog	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
419	86	Annexure 9 - Functional and Technical Requirements	D. Opportunity Management	4. Multiple dynamic opportunity page layouts: Set up different opportunity page layouts to manage different sales situations (e.g. product vs. services opportunity; enterprise vs. small business opportunity).	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
420	86	Annexure 9 - Functional and Technical Requirements	D. Opportunity Management	8. Product Catalogues: Map the different products to the prospect customer to convert the opportunity to a sale.	At present in which system product catalog is maintained?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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421	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	1. Payment Processing: The system should have the capability to process and track customer payments, including credit card, loan, wire transfer, and clearing house transactions etc. The system should also have the ability to allocate payments to specific accounts and reconcile payments against invoices.	As per our understanding, Bank already has an existing payment system, wherein the payment processing and calculations are being handled. However, if required, the proposed CRM will integrate with the existing payment system and track the customer payments in the application. Kindly confirm.	Bank has an existing Payment System. Bidder to comply with RFP terms and conditions.
422	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	1. Payment Processing: The system should have the capability to process and track customer payments, including credit card, loan, wire transfer, and clearing house transactions etc. The system should also have the ability to allocate payments to specific accounts and reconcile payments against invoices.	Please explain with further details on 'The system should also have the ability to allocate payments to specific accounts and reconcile payments against invoices'	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
423	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	1. Payment Processing: The system should have the capability to process and track customer payments, including credit card, loan, wire transfer, and clearing house transactions etc. The system should also have the ability to allocate payments to specific accounts and reconcile payments against invoices.	May I please request confirmation on whether the bank has existing integration with any payment gateway? If so, could you kindly specify the payment gateway's name that can be used for integrations? Furthermore, is it necessary for the bidder to integrate with the clearing house?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
424	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	1. Payment Processing: The system should have the capability to process and track customer payments, including credit card, loan, wire transfer, and clearing house transactions etc. The system should also have the ability to allocate payments to specific accounts and reconcile payments against invoices.	Where does the payment details are currently being stored/managed? In which system?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder



425	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	1. Payment Processing: The system should have the capability to process and track customer payments, including credit card, loan, wire transfer, and clearing house transactions etc. The system should also have the ability to allocate payments to specific accounts and reconcile payments against invoices.	Will the proposed system create invoices? Need details on the expectation from the proposed CRM system regarding Invoices & recovery?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
426	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	1. Payment Processing: The system should have the capability to process and track customer payments, including credit card, loan, wire transfer, and clearing house transactions etc. The system should also have the ability to allocate payments to specific accounts and reconcile payments against invoices.		No query posted
427	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	1. Payment Processing: The system should have the capability to process and track customer payments, including credit card, loan, wire transfer, and clearing house transactions etc. The system should also have the ability to allocate payments to specific accounts and reconcile payments against invoices.	Generally the transactions are taken care by the LOB/ Core banking system? Is it safe to assume that the recent payment summary its to be fetched from the Core system and updated in CRM?	All critical data will be fetched through bank's API Gateway.
428	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	2. Payment Collections: The system should be able to automate the collection process, including sending reminders and overdue notices to customers, alerts for loan recovery, etc. The system should also have the ability to initiate manual collections activities, such as phone calls, emails, FOS (Feet on the street) services etc.	Which is the current system for Payment Collections?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder



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429	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	3. Payment Dispute Management: The system should have the ability to manage payment disputes, including tracking the dispute, resolving the dispute, and updating the customer account accordingly.	As per our understanding, Bank already has an existing payment system, wherein the payment dispute processing and calculations are being handled. However, if required, the proposed CRM will integrate with the existing payment system and track the customer payments in the application. Kindly confirm.	Yes
430	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	3. Payment Dispute Management: The system should have the ability to manage payment disputes, including tracking the dispute, resolving the dispute, and updating the customer account accordingly.	what are the different collection methods?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
431	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	3. Payment Dispute Management: The system should have the ability to manage payment disputes, including tracking the dispute, resolving the dispute, and updating the customer account accordingly.	Please let us know high level process flow of Payment Dispute Management. Are you expecting the Service request related to 'Payment Dispute' to be logged and assigned to respective teams for analysis and track till closure? How many types are there for 'Payment Dispute' related cases?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
432	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	3. Payment Dispute Management: The system should have the ability to manage payment disputes, including tracking the dispute, resolving the dispute, and updating the customer account accordingly.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
433	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	3. Payment Dispute Management: The system should have the ability to manage payment disputes, including tracking the dispute, resolving the dispute, and updating the customer account accordingly.		No query posted
434	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	4. Payment Recovery: The system should have the ability to initiate recovery activities, including wage garnishment, legal action, and other methods to recover past-due amounts.	As per our understanding, Bank already has an existing payment system, wherein the payment recovery processing and calculations are being handled. However, if required, the proposed CRM will integrate with the existing payment system and track the customer payments in the application. Kindly confirm.	Yes
435	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	4. Payment Recovery: The system should have the ability to initiate recovery activities, including wage garnishment, legal action, and other methods to recover past-due amounts.	Please explain with further details on the expectation here	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



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436	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	4. Payment Recovery: The system should have the ability to initiate recovery activities, including wage garnishment, legal action, and other methods to recover past-due amounts.	Please explain bank's process for Payment Recovery? Are you expecting any intergration with bank's system?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
437	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	4. Payment Recovery: The system should have the ability to initiate recovery activities, including wage garnishment, legal action, and other methods to recover past-due amounts.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
438	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	4. Payment Recovery: The system should have the ability to initiate recovery activities, including wage garnishment, legal action, and other methods to recover past-due amounts.		No query posted
439	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	5. Reporting and Analytics: The system should provide real-time reporting and analytics on payment and collection activities, including aging reports, payment trends, and performance metrics. The system should also allow for customizable reports and dashboards.	Is it safe to assume that the data is made available to built the dashboard ? In which systems these data currently being managed?	The data will be shared through Bank's API gateway.
440	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management	6. Customer Segmentation: The system should have the ability to segment customers using ML-AI based on customer meta data with the bank such as payment history, payment behavior, high-risk/low risk customers and other relevant factors. This segmentation should further be processed using ML-AI to prioritized which customer need attention such as chances of default in payment of the installment etc.	Does the Bank uses any AI/ML models currently or is it expected the bidder to develop these models?	Bidder to comply with RFP terms and conditions.
441	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management		Is it fair to assume that proposed CRM solution should be able to integrate with the collection management system and provide insights for customer 360. A complete collection management being core functionality will be sitting in the CBS system and we need to integrate to that.	Proposed solution must contain Collection Management as part of CRM. Bidder to comply with RFP terms and conditions.



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442	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management		Is it fair to assume Payment Processing, Payment Collections, Payment Dispute Management related business processes can be initiated from CRM system using integration with external system (like CBS etc) and actual core collection related process will be out of scope of CRM.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
443	86	Annexure 9 - Functional and Technical Requirements	E. Collection Management		Third Party System integrations will be required like payment gateways, Canara Bank backend systems (ERP, Billing etc), communication channels for the collections modules to work effectively. The flows and process can be created on Salesforce, for actual payment details, integration with payment gateways and Canara Bank's core system will be required. Payment Reconciliation will be done on Canara Bank's core system, the details can be pulled on Salesforce via Integration The cost of the Tools/ Systems/ APIs/ Connector will be borne by Canara Bank.	Bidder has to use the Bank's API gateway for necessary integrations for the proposed CRM solutions.
444	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	1. Monitoring and alerts: Ability to monitor social media platforms 24x7 for customer queries, bad reviews, negative mentions, questions, complaint raised from any social media channels using respective tools like Social Mention, tags/Hashtags SEMrush, SentiOne, Reputology, Review Push, Chat meter, Rank Range etc.	Which social media platforms need to be taken into consideration as part of this project?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
445	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	1. Monitoring and alerts: Ability to monitor social media platforms 24x7 for customer queries, bad reviews, negative mentions, questions, complaint raised from any social media channels using respective tools like Social Mention, tags/Hashtags SEMrush, SentiOne, Reputology, Review Push, Chat meter, Rank Range etc.	Which social media channels are targeted?	All the social media channels with Bank's presence are to be considered



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446	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	1. Monitoring and alerts: Ability to monitor social media platforms 24x7 for customer queries, bad reviews, negative mentions, questions, complaint raised from any social media channels using respective tools like Social Mention, tags/Hashtags SEMrush, SentiOne, Reputology, Review Push, Chat meter, Rank Range etc.	Does the bank have any existing tool or mechanism for monitoring and managing alerts and customers queries?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
447	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	1. Monitoring and alerts: Ability to monitor social media platforms 24x7 for customer queries, bad reviews, negative mentions, questions, complaint raised from any social media channels using respective tools like Social Mention, tags/Hashtags SEMrush, SentiOne, Reputology, Review Push, Chat meter, Rank Range etc.	Does the Bank have licenses/subscriptions to the tools mentioned like Social mention, SEMrush, Sentione etc? Is it expected CRM to integrate with all these systems? Please clarify?	Bidder to comply with RFP terms and conditions.
448	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	1. Monitoring and alerts: Ability to monitor social media platforms 24x7 for customer queries, bad reviews, negative mentions, questions, complaint raised from any social media channels using respective tools like Social Mention, tags/Hashtags SEMrush, SentiOne, Reputology, Review Push, Chat meter, Rank Range etc.	Does bank have business account handles for the metioned channels like Social Mention, tags/Hashtags SEMrush, SentiOne, Reputology, Review Push, Chat meter, Rank Range etc. Kindly confirm.	Bidder to comply with RFP terms and conditions.
449	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	2. Resolution: Provide round the clock 24x7x365 support to resolve the customer complaint in real time. It should also be able to segregate, prioritize and resolve the issues that affect brand reputation on social media and should be able to provide responses in multiple languages.	What is the number of additional languages that need to be considered for providing responses in this situation?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



450	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	2. Resolution: Provide round the clock 24x7x365 support to resolve the customer complaint in real time. It should also be able to segregate, prioritize and resolve the issues that affect brand reputation on social media and should be able to provide responses in multiple languages.	Does the Bank have Call center/Customer Service team who works 24/7? Resolve the issues means by the CRM automatically? Are we talking about Straight through processes here? As some of the issues require manual intervention. ? Howmany STPs we are talking about?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
451	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	2. Resolution: Provide round the clock 24x7x365 support to resolve the customer complaint in real time. It should also be able to segregate, prioritize and resolve the issues that affect brand reputation on social media and should be able to provide responses in multiple languages.	Kindly specify the different language support that the bank is looking for.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
452	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	3. Ability to create tickets automatically (with defined TAT's and SLA's in consultation with bank) for social media complaints/mentions and direct them to the respective employee/branch/department for quick resolution.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
453	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	4. Ticketing system: Ability to create and manage tickets to track customer interactions with a suitable audit trail.	Does Bank have third party tools to support the following functionalities - 1. Posting on social media 2. Scheduling Post on social channels 3. Crawling tool for social media post Kindly confirm.	Bidder to comply with RFP terms and conditions.
454	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	4. Ticketing system: Ability to create and manage tickets to track customer interactions with a suitable audit trail.	Does Bank have third party tools to support response tracking for email, SMS and social channels. Kindly confirm.	Bidder to comply with RFP terms and conditions.
455	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	4. Ticketing system: Ability to create and manage tickets to track customer interactions with a suitable audit trail.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
456	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	6. Ability to view translation of the comment in vernacular languages other than English or Hindi.	what other languages?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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457	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	6. Ability to view translation of the comment in vernacular languages other than English or Hindi.	What is the number of vernacular languages that need to be taken into consideration in this situation?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
458	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	6. Ability to view translation of the comment in vernacular languages other than English or Hindi.	How many languages need to be supported for the employee-facing app, portal (if needed from CRM - already covered in other questions)? Do you want the vendor to provide translation strings as well, or will it be provided by you?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
459	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	6. Ability to view translation of the comment in vernacular languages other than English or Hindi.	Integration with third party tool will be required translation. The cost of the Tool/ APIs/ Connector will be borne by Canara Bank.	Bidder to comply with RFP terms and conditions.
460	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	7. Ability to send follow-up reminders on pending tickets and End-to-End ticket tracking.	In addition to English, is the bank expecting to send reminders in other languages?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
461	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	9. Ability to capture image mentions across Digital and Social Media.	Please explain on Image mentions that is referred here	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
462	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	14. Multi-channel support: Ability to configure and create service request from different channels like Email, SMS, Website, Google Play Store, IOS Apps, Net Banking, Social Media (Facebook, Twitter, Instagram etc.), IVR, Chabot, RBI Portal.	Our understanding is that Bank will procure and provide all the required API's to the new CRM for all the mentioned channel support.	Bidder to comply with RFP terms and conditions.
463	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	14. Multi-channel support: Ability to configure and create service request from different channels like Email, SMS, Website, Google Play Store, IOS Apps, Net Banking, Social Media (Facebook, Twitter, Instagram etc.), IVR, Chabot, RBI Portal.	Can you confirm whether the bank currently has its own chatbot solution? Also, does the bank have its own mobile app solution, and if not, is it required for the bidder to provide one?	Yes, to be integrated with the proposed CRM solution. Bidder to comply with RFP terms and conditions.
464	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	14. Multi-channel support: Ability to configure and create service request from different channels like Email, SMS, Website, Google Play Store, IOS Apps, Net Banking, Social Media (Facebook, Twitter, Instagram etc.), IVR, Chabot, RBI Portal.	Is it safe to assume that the integration with the mentioned systems is expected? Can we assume that the Bank has appropriate APIs/Subscriptions wherever required?	Bidder has to provide required APIs for proposed CRM solution. Bidder to comply with RFP terms and conditions.



465	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	15. Collaboration tool: Ability for multiple agents to collaborate and resolve customer inquiries together.	As per our understanding, Bank must be having a collaboration tool like MS team or Microsoft Outlook, and the new proposed CRM will leverage the same by integrating. Kindly confirm.	Bidder to provide necessary solution to meet the intent of the RFP.
466	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	17. The agency is responsible to track any abusive/adult/obnoxious content against the bank that tarnishes bank's or any of its associated employee's reputation and henceforth avert the same under intimation to the bank.	Request Bank to Elaborate the requirement? What is expected by the CRM?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
467	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	17. The agency is responsible to track any abusive/adult/obnoxious content against the bank that tarnishes bank's or any of its associated employee's reputation and henceforth avert the same under intimation to the bank.	Which agency is referred to here? Are you also looking for social media management services as part of this RFP, or will the RFP cover the platform alone?	Agency here refers to the Bidder. The bidder to provide social media management services as part of CRM solution
468	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	19. Reporting: Ability to provide platform wise report through real time dashboard, graphics etc. with contents such as tweets and replies, data and count, Complainant Name, Complainant No., Account No. (If applicable), Complainant Profile link, Complaint Type, Complaint Platform, First Time Resolution %, Avg. daily mentions, Top mention/Tweet/Post, Impressions/Click, Website Engagement, Avg. Likes/Retweets, Demographics segregation of Complaints, Compliments, Unsolicited tweets count, Page/Media views, Conversion Tracking, Social Media Campaign Performance, Social Media Leads Classification and Generation, Employee Tweets, Competitor Analysis etc.	Kindly provide details of all the third party platforms referred here for getting details to generate report .	Currently bank is available on following social media platforms & the proposed solution should be capable of handling any new additions in future without any cost: Facebook Twitter youtube Instagram Linkedin Pinterest



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469	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	20. Reporting - Ability to Gather data from various social media channels, web/app news platform and other digital platforms. Tool used must not have any limitations on collection of mentions/keywords data.	Is it required for the bidder to integrate with web/app news platforms, and if so, what are the specific web/app news platforms that need to be taken into consideration? Additionally, what are the different digital platforms that need to be considered for this project?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
470	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	21. Ability to Identify and reach out to key bloggers and influencers.	Could you please provide additional clarification regarding this specific requirement?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
471	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	21. Ability to Identify and reach out to key bloggers and influencers.	The functionality will likely include multiple channels/platforms. Are you looking for CRM to integrate with those channels to get the influencer data as inputs (for collaboration/supporting them etc)? Are there any other use cases targeted at CRM system in this requirement?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
472	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	24. Collate/analyze social media, digital marketing trend, theme and rankings of peer's/market standards to identify new insights on real time basis.	Assumption: Salesforce will be used to just display the data.	Bidder to comply with RFP terms and conditions.
473	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	25. Integration: The proposed tool should have the ability for integration with existing Canara Bank platform such as LMS/complaint management/call center etc., as and when deemed necessary in social media context without any additional cost to the Bank.	But there will be some cost related to activities like configurations, testing, deployment, etc. This needs to be explored further.	Bidder to comply with RFP terms and conditions.
474	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	25. Integration: The proposed tool should have the ability for integration with existing Canara Bank platform such as LMS/complaint management/call center etc., as and when deemed necessary in social media context without any additional cost to the Bank.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



475	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management	25. Integration: The proposed tool should have the ability for integration with existing Canara Bank platform such as LMS/complaint management/call center etc., as and when deemed necessary in social media context without any additional cost to the Bank.	CRM platform will support REST based integration / have connectors in popular applications. Are there specific systems that you need integrations with - e.g. external complaint mgt. system? What does call center integration expected to do? Pl. provide details of all systems to be integrated if the integrations are intended to be implemented as part of RFP scope.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
476	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management		Does the Bank have any Social media tools currently being used like Sprinklrs etc with which the integration is expected?	Bidder to provide such tools in the proposed CRM solution to comply with RFP terms
477	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management		Do you have an existing Digital/Social Media Marketing tool?	The proposed solution must consist of Digital/Social Media Marketing tools, etc.
478	87	Annexure 9 - Functional and Technical Requirements	F. Social Media management		Which languages are targeted in the scope of the RFP? Is the intent to make the user understand the comment and respond in English?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
479	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components	1. Ability to generate On the Fly/Dynamic Reports from Application through GUI	Does the Bank have any Reporting/BI/Analytical tool / app being used currently like Power BI/Tablue etc?	Bidder to comply with RFP terms and conditions.
480	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components	7. Session Activity Report, Session Log Activity Report, User Performance Report.	Total Unique Visitors on the web properties (Desktop + mobile Web) in a month. (Please note even if one visitor is opening site multiple times for the unique visitor count is 1)	Bidder to comply with RFP terms and conditions.
481	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components	7. Session Activity Report, Session Log Activity Report, User Performance Report.	Total Monthly Active Users across the mobile apps (Unique number of users who opened the app in the last 30 days)	Bidder to comply with RFP terms and conditions.
482	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components	8. Notification Report, Internal Audit Report; Non-Financial Transaction type wise Report; Financial Transaction type wise Report.	These report seem to be Core banking reports. Please confirm.	No. The proposed solution should have the capability of generating such reports.
483	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components	9. The system should have capability to interface with Bank's existing analytics/MIS/ DATA WAREHOUSE platform to fetch reports and display in the CRM dashboard and reports menu.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.



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484	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components	9. The system should have capability to interface with Bank's existing analytics/MIS/ DATA WAREHOUSE platform to fetch reports and display in the CRM dashboard and reports menu.	Kindly mention the system names for - 1. Existing Analytics 2. MIS 3. Data Warehouse	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
485	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components	15. Availability of Complaint Management Dashboards & reports for reporting to regulatory authorities like RBI, SLBC, MOF, NPCI etc.	please explain	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
486	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components	15. Availability of Complaint Management Dashboards & reports for reporting to regulatory authorities like RBI, SLBC, MOF, NPCI etc.	Reports can be downloaded and shared with the required authorities via email from the Salesforce system or offline means.	Bidder to comply with RFP terms and conditions.
487	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components		How many Reports are Dashboards are expected to be delivered? If possible, please share sample reports.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
488	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components		How Many users will Generate on the Fly /Dynamic Reports	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
489	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components		How Many users will Consume the Reports	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
490	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components		Which users are expected to Download and the Business Reasons behind downloading ?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
491	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components		What is the Banks Existing Analytics Landscape ? What is Used for MIS, What is Used as Data Warehouse ? Where is the Data Warehouse Hosted ?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
492	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components		If there exists any MIS Team ? is the team centralized and what is the Workforce strength of the Team ?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
493	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components		How Many Business Users need to create Dynamic Reports ?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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494	89	Annexure 9 - Functional and Technical Requirements	G. Dashboard / Reports components		Where is the Current Database/Datawarehouse Hosted ? On PRemise or On Public Cloud ?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
495	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	1. Should have in-built and customizable Analytical Machine Learning (ML) models for Segmenting the customers, Market Basket Analysis, Customer lifetime value (CLV), Customer Profile, Customer behavioral Study. Option to drill down to various levels HO/CO/RO/upto Branch.	More details please	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
496	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	1. Should have in-built and customizable Analytical Machine Learning (ML) models for Segmenting the customers, Market Basket Analysis, Customer lifetime value (CLV), Customer Profile, Customer behavioral Study. Option to drill down to various levels HO/CO/RO/upto Branch.	Generally the CRM platforms/product will have AI/ML capabilities, but the models need to be developed and trained. Is it the capability question? How many models are we talking about as part of current implementation?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
497	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	2. Should be capable of integrating with Bank's existing ML models. Should be capable of integrating with any analytical solution used for ML modelling. The AI/ML should evolve over time by adding more and more data points/inputs to the algorithm and improve the current banking processes.	Which AI/ML technology / solution the Bank is using currently?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
498	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	2. Should be capable of integrating with Bank's existing ML models. Should be capable of integrating with any analytical solution used for ML modelling. The AI/ML should evolve over time by adding more and more data points/inputs to the algorithm and improve the current banking processes.	Which analytical platforms are expected to be integrated as part of this project?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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499	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	4. Should have capability to provide Analytical insights to customers about his profile and suggesting Goal based Upsell/ Cross sell offers to him.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
500	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	5. Should be capable of seamlessly integrating ML generated Leads data to campaign module and flow of feedback from campaign to ML models for completion of ML operations life cycle.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
501	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	7. Should be capable of having various use cases and scenarios to improve customer satisfaction and customer retention.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
502	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	8. Should be capable of categorizing the customers based on risk of churn.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
503	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	10. Capability to convert conversation (From Call center) into a transcript for Text mining models.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
504	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	10. Capability to convert conversation (From Call center) into a transcript for Text mining models.	Is the vendor expected to suggest a text mining tool or integrate with an existing one?	Bidder to comply with RFP terms and conditions. Proposed solution should have the capability of suggesting a text mining tool.
505	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting	10. Capability to convert conversation (From Call center) into a transcript for Text mining models.	Integration with third party tool will be required to convert speech to text. The cost of the Tool/ APIs/ Connector will be borne by Canara Bank.	Bidder to comply with RFP terms and conditions.
506	90	Annexure 9 - Functional and Technical Requirements	H. Predictive Analysis & Forecasting		Is the vendor expected to provide an AI/ML tool or integrate with an existing one?	Proposed CRM solution should have the capability/tool of AI/ML.
507	91	Annexure 9 - Functional and Technical Requirements	I. User and workflow Management	5. Provision to generate Performance evaluation report of employees/branch/RO/CO/HO level and ability to generate reports for monitoring.	Do you have any Incentive plans?	Bank will be having incentive plans as per it's business/operational requirement. Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
508	91	Annexure 9 - Functional and Technical Requirements	I. User and workflow Management	5. Provision to generate Performance evaluation report of employees/branch/RO/CO/HO level and ability to generate reports for monitoring.	Does performance evaluation means tracking the targets of each employee and then compensating them based on that? Does this require calculation of commissions as well?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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509	91	Annexure 9 - Functional and Technical Requirements	I. User and workflow Management	5. Provision to generate Performance evaluation report of employees/branch/RO/CO/HO level and ability to generate reports for monitoring.	What are the typical performance KPIs for employees, branch etc?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
510	91	Annexure 9 - Functional and Technical Requirements	I. User and workflow Management	7. Provision to assign Lead & Campaign Target to each branches/teams based on Organization hierarchy from RO/HO Level.	How many Sales persons get incentivized? Does Direct Sales Agent also get incentives Any Partner / Agent onboarding?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
511	91	Annexure 9 - Functional and Technical Requirements	I. User and workflow Management	9. Ability to create workflow rule to handle complaint. Such as ability to create tickets automatically (with defined TAT's and SLA's in consultation with bank) for complaints raised from any channel and automatically assign to the appropriate user/group based on the logic provided by the bank and escalation in case the resolution was not provided with in a time frame etc.	Please provide case routing rules and process to allocate case to agents	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
512	91	Annexure 9 - Functional and Technical Requirements	I. User and workflow Management		Please specify if User roles, rights, position will be integrated through internal bank systems or it can be assumed that system administrators will configure manually in CRM through front end configurable interface.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
513	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	1. Ability to initiate a new/duplicate card from CRM as per the customer request and his/her eligibility.	As per our understanding, the proposed CRM shall provide end to end workflow for Card Management. However, transactions will be handled in the core system. Kindly confirm.	Yes
514	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	1. Ability to initiate a new/duplicate card from CRM as per the customer request and his/her eligibility.	Are you expecting any STP (Straight Through Processing) to be developed for Ticketing / Service Request system? How many and which STP's need to be developed? For STP's, how many Bank's systems need to be integrated?	STP is required as part of the proposed CRM solution.
515	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	1. Ability to initiate a new/duplicate card from CRM as per the customer request and his/her eligibility.	Is CRM intended to integrate with existing CBS or any other system for the actual card issue processing?	Yes. Proposed solution must be integrated with Bank's existing card management system.
516	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	1. Ability to initiate a new/duplicate card from CRM as per the customer request and his/her eligibility.	The CRM will take/create a Service Request/Case in the CRM and pass the details to Bank's Card System/Core system for further action. Is our understanding correct?	Yes



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517	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	2. Ability to block/hotlist a card based on customer request.	As above. The role of CRM is to take the request in the System and pass the details for further processing and update the Service request in CRM upon receiving status from Bank's LOB system?	Yes
518	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	2. Ability to block/hotlist a card based on customer request.	Is CRM intended to integrate with existing CBS or any other system for the actual processing? Or, will the integration be with multiple systems to hotlist/block card (or do card-related transactions)?	Yes. Proposed solution must be integrated with Bank's existing card management system.
519	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	4. Card Management-Inventory, Activation, Primary and Add-on Card, Renewals & Replacements.	Is there any existing system for Card Management?	Yes
520	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	4. Card Management-Inventory, Activation, Primary and Add-on Card, Renewals & Replacements.	What is expected of CRM for this requirement? Typically the Card Management module is not part of CRM and needs to be customized? Is it expected to integrate with Bank's Card Management system? Please clarify	Bidder has to integrate with existing Card Management of the bank.
521	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	4. Card Management-Inventory, Activation, Primary and Add-on Card, Renewals & Replacements.	Pl. describe the requirement here	Proposed solution should have maker checker functionality.
522	92	Annexure 9 - Functional and Technical Requirements	J. Card Management	6. Ability to handle complaints like payment failures, multiple debits/credits, wrong charge, Chargeback etc.,	Can we assume that the CRM system will capture complaints, and the processing is done manually in CBS or existing systems?	Proposed solution should integrate with Bank's existing complaint handling ecosystem
523	92	Annexure 9 - Functional and Technical Requirements	J. Card Management		From which system will card details be published in CRM?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
524	92	Annexure 9 - Functional and Technical Requirements	J. Card Management		Channels through which card management request will be accepted? Does it need customer authentication before processing the request	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
525	92	Annexure 9 - Functional and Technical Requirements	J. Card Management		Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
526	92	Annexure 9 - Functional and Technical Requirements	J. Card Management		Please confirm if bank has existing Card Management solution and proposed solution is only to capture customer's requests related to card as front end tool and a full-fledge card management solution is not in scope. Also w.r.t. to response to this query, please modify the requirements in card management sections accordingly	Bidder to comply with RFP terms and conditions.





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531	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	5. Proposed CRM Platform should facilitate Users to focus on increasing the Total Relationship Value (TRV) and Assets Under Management (AUM) of customers as per the Business objectives, Customer Life Time Value.	Where does the AUM details and TRV details currently being managed? Is it expected of CRM to integrate with these systems and get the details	Proposed solution should have the capability of increasing the Total Relationship Value (TRV) and Assets Under Management (AUM) of customers as per the Business objectives, Customer Life Time Value
532	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	9. Ability to Cross sell a range of Investment and Insurance products to customers in order to meet their Financial planning objectives.	Does Bank have an existing offer management system for cross - sell and up - sell of offers.  Or is Bank looking for a new solution to meet the requirement. Kindly confirm.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
533	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	11. CRM package should enable Relationship Management for HNI & ultra HNI customers.	How many existing HNI customers does Bank have ?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
534	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	18. Facilitate User for the revenue generation through Cross selling using all Bank's touch points including digital payment solutions.	What are the different touchpoints that need to be taken into account or considered in this situation?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
535	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	21. Facilitate coordinates with retail liabilities section, digital and social media, call center and other key stake holders that facilitate the cross selling business.	Could you please provide additional clarification regarding this specific requirement?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
536	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	21. Facilitate coordinates with retail liabilities section, digital and social media, call center and other key stake holders that facilitate the cross selling business.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
537	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	23. Relationship Management in CRM package should include features such as portfolio tracking, asset allocation, performance reporting and portfolio rebalancing.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
538	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	23. Relationship Management in CRM package should include features such as portfolio tracking, asset allocation, performance reporting and portfolio rebalancing.	CRM to fetch the details and provide the summary of the portfolio, asset allocation etc. by integrating with Core systems? Is our understanding correct?	Yes



539	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	24. The package should have analytical tools for financial planning, risk management and portfolio analysis.	This generally happens in the Specialized Wealth Management and analytical tools and not part of CRM. Request to reconsider the same	Bidder to comply with RFP terms and conditions.
540	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	24. The package should have analytical tools for financial planning, risk management and portfolio analysis.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
541	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	24. The package should have analytical tools for financial planning, risk management and portfolio analysis.	Please provide details?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
542	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	24. The package should have analytical tools for financial planning, risk management and portfolio analysis.	Can sample analytics be shared?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder
543	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	25. CRM platform should be capable of facilitating the on boarding of customer's account opening process from lead/opportunity management and manage operations of on boarding of liability products by integrating with the existing systems of the Bank viz. e-KYC, customer profiling, etc	Could you please confirm if it is assumed that Canara Bank already possesses an eKYC solution, and if the CRM system needs to integrate with this existing solution?	Yes. Proposed solution must be integrated with Bank's existing API/system.
544	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	25. CRM platform should be capable of facilitating the on boarding of customer's account opening process from lead/opportunity management and manage operations of on boarding of liability products by integrating with the existing systems of the Bank viz. e-KYC, customer profiling, etc	Can you confirm whether the bank currently has its own digital account opening onboarding solution and if the vendor needs to integrate with the existing solution?	Yes. The bidder should integrate the proposed solution with Bank's existing Digital Account opening solution/APIs.



545	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	25. CRM platform should be capable of facilitating the on boarding of customer's account opening process from lead/opportunity management and manage operations of on boarding of liability products by integrating with the existing systems of the Bank viz. e-KYC, customer profiling, etc	Please provide the names of the vendors involved in the customer onboarding process (eKYC, Aadhaar, PAN card, cKYC, video KYC etc) The cost of the Tools/ Systems/ APIs/ Connector will be borne by Canara Bank.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
546	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)	25. CRM platform should be capable of facilitating the on boarding of customer's account opening process from lead/opportunity management and manage operations of on boarding of liability products by integrating with the existing systems of the Bank viz. e-KYC, customer profiling, etc	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
547	92	Annexure 9 - Functional and Technical Requirements	K. Relationship Management (Including Associate Party Products)		Is it right to assume that CRM system should be able to show the key customer metrics as part of customer 360 and RMs should be able to propose products based on that. The core transactions for relationship management will be done on CBS system.	Yes
548	94	Annexure 9 - Functional and Technical Requirements	L. Call Centre Operations	1. Role based access to be provided to Outsourced Agents (Inbound and Outbound), Team Leads and other officials at Call Centre. The roles should be defined in the Admin console. The CRM should be made available to outsourced Call Centre Agents as per the discretion of the Bank.	What is the CTI tool?	Bidder to comply with RFP terms and conditions.
549	94	Annexure 9 - Functional and Technical Requirements	L. Call Centre Operations	1. Integration and accessibility to Bank's existing/new Call Centre.	Please provide the name of the call centre vendor. The cost of the Tools/ Systems/ APIs/ Connector will be borne by Canara Bank.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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550	94	Annexure 9 - Functional and Technical Requirements	L. Call Centre Operations	1. Role based access to be provided to Outsourced Agents (Inbound and Outbound), Team Leads and other officials at Call Centre. The roles should be defined in the Admin console. The CRM should be made available to outsourced Call Centre Agents as per the discretion of the Bank.	Could the bank let us know - number of Call Centers - Number of Agents for each Call Center - Number of Out Bound Agents - Number of Inbound Agents - Volume of Inbound Calls - Volume of Out Bound Calls. - CTI Make and Version - IVR Make and Version.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
551	94	Annexure 9 - Functional and Technical Requirements	L. Call Centre Operations	3. The proposed solution should provide features for handling General enquiries, Account based enquiries and requests, Card related services for all types of customers of the bank.	How many Categories and Subcategories are there for a Ticket / Service Request? Are you going to capture different set of fields against ticket based on Category and Sub Category?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
552	94	Annexure 9 - Functional and Technical Requirements	L. Call Centre Operations	4. The proposed solution should provide Location and contact details of Bank Branches, ATM, kiosks and any other business units of the Bank in search option.	Need more clarity	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
553	94	Annexure 9 - Functional and Technical Requirements	L. Call Centre Operations	5. Ability to provide access to collection management module.	what are the different collection methods?	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
554	94	Annexure 9 - Functional and Technical Requirements	L. Call Centre Operations		How many call center users will be using CRM application?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
555	94	Annexure 9 - Functional and Technical Requirements	M. Other Technical requirements	1. Availability of Mobile App of CRM in Android & IOS Platforms with GPS tracking and Geo-tagging functionality.	Kindly let us know if new App is required or the required functionality in the existing App.	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
556	94	Annexure 9 - Functional and Technical Requirements	M. Other Technical requirements	1. Availability of Mobile App of CRM in Android & IOS Platforms with GPS tracking and Geo-tagging functionality.	Is the requirement limited action based Geo tagging (e.g. Meeting creation, status update, disposition update etc) & route planing <u>OR</u> it also requires continous tracking for the purpose of real time location trackig, distance travelled calculation etc too	Bidder to comply with RFP terms and conditions.
557	94	Annexure 9 - Functional and Technical Requirements	M. Other Technical requirements	1. Availability of Mobile App of CRM in Android & IOS Platforms with GPS tracking and Geo-tagging functionality.	Please elaborate more	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
558	94	Annexure 9 - Functional and Technical Requirements	M. Other Technical requirements	1. Availability of Mobile App of CRM in Android & IOS Platforms with GPS tracking and Geo-tagging functionality.	Google APIs will be provided and paid by Canara Bank for integration for geo-tagging	No



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559	94	Annexure 9 - Functional and Technical Requirements	M. Other Technical requirements	1. Availability of Mobile App of CRM in Android & IOS Platforms with GPS tracking and Geo-tagging functionality.	Is offline capability for mobile app for any user required?	Bidder to comply with RFP terms and conditions.
560	94	Annexure 9 - Functional and Technical Requirements	M. Other Technical requirements	1. Availability of Mobile App of CRM in Android & IOS Platforms with GPS tracking and Geo-tagging functionality.	Please elaborate more	RFP clause is self explanatory. Bidder to comply with RFP terms and conditions.
561	94	Annexure 9 - Functional and Technical Requirements	M. Other Technical requirements	3. Bidder should conduct DR Drill activity for the channels integrated to CRM application every quarter / as per schedule.		No query posted
562	94	Annexure 9 - Functional and Technical Requirements	M. Other Technical requirements		Please share the current IT Landscape. (Architecture diagram for all systems pulling data from/pushing data to current CRM)	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
563	94	Annexure 9 - Functional and Technical Requirements	M. Other Technical requirements		Which configuration management tool is being used for CI/CD pipeline? Can we assume that pipeline creation & maintenance will be done by bank, and vendor shall support and guide Bank IT team for he same	Bidder to comply with RFP terms and conditions.
564	96	Annexure 10 - Technical Evaluation Criteria	1. Implementation experience of Bidder/OEM		Could the bank relax the Purchase Order requirement. As most times PO names will not be in Bidders Name as well as PO Carry sensitive Information live Cost which existing customers wouldn't like to be shared.	Bidder to comply with RFP terms and conditions.



565	96	Annexure 10 - Technical Evaluation Criteria	2. Hosting of solution		<p>We find the following contradictions in the RFP in providing the CRM solution on SaaS Model:-</p> <p>1) RFP ask is for providing licenses on unlimited user based for perpetual enterprise model.</p> <p>2) Annexure -17 requires the bidder to quote for license and ATS fees for the solution on Capex model.</p> <p>3) Bank has segregated data residency between on-premise and public cloud but not segregated functionalities to be deployed on-premise and public cloud.</p> <p>If the Bank wants perpetual unlimited licenses, we suggest the Bank not to ask for the Solution on SaaS model.</p> <p>Additionally, we recommend that the entire solution should be deployed on a hyper-converged cloud ready infrastructure with a capability to convert to full cloud / hybrid based on Bank's requirement/discretion at any point of time during the contract period. The Bidder can be asked to include the cost of the same.</p>	Bidder to comply with RFP terms and conditions.
566	96	Annexure 10 - Technical Evaluation Criteria	3. Availability of services in proposed solution to integrate with several modules:	<ul style="list-style-type: none"> <li>i. Customer 360 View</li> <li>ii. Campaign management</li> <li>iii. Lead Management Module</li> <li>iv. Opportunity Management</li> <li>v. Collection management</li> <li>vi. Social Media management</li> <li>vii. User and workflow Management</li> <li>viii. Dashboard / Reports components</li> <li>ix. Card management</li> <li>x. Wealth Management</li> <li>xi. Call Centre Operations</li> <li>xii. Predictive Analysis &amp; Forecasting</li> </ul>	<p>We request the Bank to clarify with examples what exactly is required to be mentioned for Card management and Wealth management in the documentary proof /artifacts to be submitted for this criteria</p>	Bidder to comply with RFP terms and conditions.



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567	96	Annexure 10 - Technical Evaluation Criteria	1. Implementation experience of Bidder/OEM		1) Please allow Scheduled Public / Private sector Bank/ foreign bank reference with above 100 branches and more than 2 million customer base to be provided as a reference.  2) Please also allow references of a Service Provider providing Customer Management services to a Scheduled Public / Private sector Bank	Bidder to comply with RFP terms and conditions.
568	96	Annexure 10 - Technical Evaluation Criteria	1. Implementation experience of Bidder/OEM		Please allow client reference of large Co-operative Banks with above 100 Branches and more than 2 Million client customer base along with NBFC / Small Finance Bank in India	Bidder to comply with RFP terms and conditions.
569	96	Annexure 10 - Technical Evaluation Criteria	1. Implementation experience of Bidder/OEM		Satisfactory performance certificate from client in BFSI/NBFC/Small Finance Bank / Co-operative Bank / Foreign Bank / Insurance Company / Any Listed company along with purchase order/work order to this effect	Bidder to comply with RFP terms and conditions.
570	96	Annexure 10 - Technical Evaluation Criteria	1. Implementation experience of Bidder/OEM		Request you to kindly amend the clause to-  Implementation/Supply experience of Bidder/OEM of CRM product globally  Schedule Public/ Private sector Bank globally: 4 Marks  NBFCs /Small finance Banks/ Public sector organizations globally: 3 Marks  Insurance company/ Any listed company globally: 2 Marks  Also, self-declaration from OEM/bidders is acceptable	Bidder to comply with RFP terms and conditions.
571	96	Annexure 10 - Technical Evaluation Criteria	2. Hosting of solution		World's leading CRM SaaS products are end-to-end managed by the OEM from their own cloud environments. This marking criteria is not relevant to the OEM's who are offering SaaS We request this marking schema to be removed to give every OEM as a fair chance and equal opportunity to score	Bidder to comply with RFP terms and conditions.



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572	96	Annexure 10 - Technical Evaluation Criteria	2. Hosting of solution		Since this is a SaaS based CRM implementation RFP, request bank to remove the points being awarded for hosting solution on-prem	Bidder to comply with RFP terms and conditions.
573	96	Annexure 10 - Technical Evaluation Criteria	3. Availability of services in proposed solution to integrate with several modules:	<ul style="list-style-type: none"> <li>i. Customer 360 View</li> <li>ii. Campaign management</li> <li>iii. Lead Management Module</li> <li>iv. Opportunity Management</li> <li>v. Collection management</li> <li>vi. Social Media management</li> <li>vii. User and workflow Management</li> <li>viii. Dashboard / Reports components</li> <li>ix. Card management</li> <li>x. Wealth Management</li> <li>xi. Call Centre Operations</li> <li>xii. Predictive Analysis &amp; Forecasting</li> </ul>	Please confirm if the components mentioned in these are to be part of solution or these need to be integrated with proposed solution, as some of the components (e.g. wealth Management) are not in FRS (Annexure 9)	Bidder to comply with RFP terms and conditions.
574	96	Annexure 10 - Technical Evaluation Criteria	3. Availability of services in proposed solution to integrate with several modules:	<ul style="list-style-type: none"> <li>i. Customer 360 View</li> <li>ii. Campaign management</li> <li>iii. Lead Management Module</li> <li>iv. Opportunity Management</li> <li>v. Collection management</li> <li>vi. Social Media management</li> <li>vii. User and workflow Management</li> <li>viii. Dashboard / Reports components</li> <li>ix. Card management</li> <li>x. Wealth Management</li> <li>xi. Call Centre Operations</li> <li>xii. Predictive Analysis &amp; Forecasting</li> </ul>	Please modify the evaluation criteria to product documentation for integration capability	Bidder to comply with RFP terms and conditions.
575	96	Annexure 10 - Technical Evaluation Criteria	1. Implementation experience of Bidder/OEM		Request you to Please provide Past Experience exemption for MSE and Startup registered Bidders	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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576	96	Annexure 10 - Technical Evaluation Criteria	3. Availability of services in proposed solution to integrate with several modules:	<ul style="list-style-type: none"> <li>i. Customer 360 View</li> <li>ii. Campaign management</li> <li>iii. Lead Management Module</li> <li>iv. Opportunity Management</li> <li>v. Collection management</li> <li>vi. Social Media management</li> <li>vii. User and workflow Management</li> <li>viii. Dashboard / Reports components</li> <li>ix. Card management</li> <li>x. Wealth Management</li> <li>xi. Call Centre Operations</li> <li>xii. Predictive Analysis &amp; Forecasting</li> </ul>	Request you to Please provide Past Experience exemption for MSE and Startup registered Bidders	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
577	104	Annexure 17 - Bill of Material			Need clarity on Table A- As there is no specific milestone wise payment has been highlighted for Implementation.	Bidder to refer Corrigendum-2.
578	104	Annexure 17 - Bill of Material			Request for Unlimited licensing is mentioned. However to conclude the licensing BOQ we need to have a detailed bifurcation of User types and their functions.	Bidder to refer Corrigendum-2.
579	115	Annexure 17 - Bill of Material			Could the bank confirm the Pricing that needs to be shared for AMC/ATC is it just the Per Month charges for Software(SAAS). Or Per Year. As page 18 8.1.9 - Says Quartey payment in arrears. If the bank requires resources in helping for L2/L3 or onsite supports that will request the bidder based on the rate card shared.	Bidder to refer Corrigendum-2.
580	127	Appendix G - Draft Contract Agreement	11. Indemnity	VENDOR/ SERVICE PROVIDER shall keep and hold the Bank indemnified and harmless from time to time and at all times against all actions, proceedings, claims, suits, liabilities (including statutory liability), penalties, demands, charges, costs (including legal costs) and expenses, damages, losses and any other expenses which may be caused to or suffered by or made or taken against the Bank arising out of:	The Indemnity clause has widely drawn risk. Bidder would like to negotiate on this clause in case the engagement/project is awarded to US. Bank to confirm	Bidder to comply with RFP terms and conditions.



581	127	Appendix G - Draft Contract Agreement	12. Confidentiality and Non-Disclosure		<p>“Except as otherwise permitted by this Agreement, neither of the parties may disclose to third parties the contents of this Agreement or any information provided by or on behalf of the other that ought reasonably to be treated as confidential and/or proprietary. Parties may, however, disclose such confidential information to the extent that it: (a) is or becomes public other than through a breach of this Agreement, (b) is subsequently received by the receiving party from a third party who, to the receiving party’s knowledge, owes no obligation of confidentiality to the disclosing party with respect to that information, (c) was known to the receiving party at the time of disclosure or is thereafter created independently, (d) is disclosed as necessary to enforce the receiving party’s rights under this Agreement, or (e) must be disclosed under applicable law, legal process or professional regulations. These obligations shall be valid for a period of 1 year from the date of termination of this Agreement.”</p>	Bidder to comply with RFP terms and conditions.
582				CRM User Count	How many users will be using CRM application?	Initially 15000 users. The selected Bidder has to provide additional user licenses as per Bank’s requirement at the same cost during contract period.
583				CRM User Count	What are the Key roles of the users?	Bidder to comply with RFP terms and conditions.
584				CRM User Count	What is Role wise User count who will use CRM application	Bidder to comply with RFP terms and conditions.
585				Data Migration	What is scope for Data Migration? How many source systems need to be considered to migrate 'Existing Customer Data' ?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
586				Data Migration	What is volume of Existing Customer Data?	Will be discussed with the selected bidder
587				Data Migration	In how many tables the existing customer data is present.	Will be discussed with the selected bidder
588				Data Migration	How many fields are required to migrate existing customer data	Will be discussed with the selected bidder
589				Data Migration	Can we assume that apart from customer master data there is no requirement to migrate existing contacts, leads, accounts, cases, attachments? Please confirm	Bidder to comply with RFP terms and conditions.



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590		A Customer 360 View	NA	At a high level could you please share the number of external & internal (homegrown) systems involved in existing tech stack? Could you also specify the purpose of these systems?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
591		C Lead management	NA	Assumption: Files will be scanned through antivirus while uploading/downloading at Bank's end. Please confirm	Bidder to comply with RFP terms and conditions.
592		C Lead management	NA	Assumption: File location Cryptographic controls will be handled as part of system that handles Document storage. Please confirm	Necessary solution relevant for successful implementation of proposed CRM solution to be provided by the bidder
593		E Collection Management	NA	Are Feet on the street agents on Bank's Payroll? What is the volume of these users?	Bidder to comply with RFP terms and conditions.
594		E Collection Management	NA	Is there any use-case for making payments from CRM platform?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
595		F Social Media Management	Ability to view translation of the comment in vernacular languages other than English or Hindi	Assumption: This service will be implemented with the help of third party solutions available as the data will be dynamic in nature.	Bidder to comply with RFP terms and conditions.
596		F Social Media Management	NA	Assumption: Logic to identify a content as Adult/Obnoxious/abusive will be achieved via third party service.	Bidder to comply with RFP terms and conditions.
597		F Social Media Management	NA	Assumption: Logic to identify key blogger/influencer will be will be achieved via third party service.	Bidder to comply with RFP terms and conditions.
598		G Dashboard / Reports components	NA	Does the bank has existing AI engine that can be leveraged or will it be implemented in Salesforce?	The proposed solution should meet RFP terms
599		G Dashboard / Reports components	NA	How many What-if_scenarios are expected to be implemented?	The proposed solution should meet RFP terms as well as Bank's business/operational requirement
600		G Dashboard / Reports components	NA	Assumption: Industry standard report format will be provided by the bank. Please confirm.	Bidder to comply with RFP terms and conditions.
601		H Predictive Analytics	NA	Does bank use any AI/ML platform currently? Or else Salesforce Einstein Analytics platform will be considered.	Bidder to comply with RFP terms and conditions.
602		G Dashboard / Reports components	NA	Which users are expected to Download and the Business Reasons behind downloading ?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
603		G Dashboard / Reports components	NA	What is the Banks Existing Analytics Landscape ? What is Used for MIS, What is Used as Data Warehouse ? Where is the Data Warehouse Hosted ?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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604			G Dashboard / Reports components	NA	Is the bank planning to upgrade or replace any of its existing analytics, data warehouse, or management information system (MIS) platforms?	Bidder to comply with RFP terms and conditions.
605					It should be submitted by the respective OEM for which bidder is quoting. However, bid document says that OEM will have to own the responsibility in case of failure of bidders so the Certificates are to be raised from the OEM (Page No.-11, S.No-6.4). Anyways, bidder is submitting the bid security	Bidder and OEM to comply with RFP terms.
606			N.A.	The bank has asked the bidder solution to comply to hybrid architecture where CRM will be on SAAS and data needs to be pulled in real time based on user requirement from On premise Database	For Hybrid architecture, we need reuse bank's ESB and API management. Request your confirmation on the same.	Bank will provide available APIs for necessary integrations
607			N.A.	End of Bid Date	Request the bank to provide an extension of 30 calendar days for submission of the bid.	Bidder to comply with RFP terms and conditions.
608			IT Landscape	Please share the current IT Landscape. (Architecture diagram for all systems pulling data from/pushing data to current CRM)	The confidential data sought for will be shared and discussed with the successful bidder.	No query posted
609			What are the systems planned to be sun-set during and post implementation?	System	What are the systems planned to be sun-set during and post implementation?	Beyond the scope of RFP
610			Please define the name of solution and purpose which are used currently	System	Please define the name of solution and purpose which are used currently:	Beyond the scope of RFP
611			Please define the name of solution and purpose which are used currently	System	Core Banking Solution	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
612			Please define the name of solution and purpose which are used currently	System	Document Management System	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



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613			Please define the name of solution and purpose which are used currently	System	AD platform/User access management /SSO	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
614			Please define the name of solution and purpose which are used currently	System	logins	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
615			Please define the name of solution and purpose which are used currently	System	Lead Management System	Bidder to comply with RFP terms and conditions.
616			Please define the name of solution and purpose which are used currently	System	Campaign Management	Bidder to comply with RFP terms and conditions.
617			Please define the name of solution and purpose which are used currently	System	Service/Ticket Management	Bidder to comply with RFP terms and conditions.
618			Please define the name of solution and purpose which are used currently	System	Business Process Management	Bidder to comply with RFP terms and conditions.
619			Please define the name of solution and purpose which are used currently	System	Loan Origination System	Bidder to comply with RFP terms and conditions.
620			Please define the name of solution and purpose which are used currently	System	Digital Lending Platform	Bidder to comply with RFP terms and conditions.
621			Please define the name of solution and purpose which are used currently	System	Digital Marketing Platform	Bidder to comply with RFP terms and conditions.



622			Please define the name of solution and purpose which are used currently	System	Call Centre/Contact Centre System	Query needs more clarification
623			Please define the name of solution and purpose which are used currently	System	Mobile Banking App	Query needs more clarification
624			Please define the name of solution and purpose which are used currently	System	Internet Banking	Query needs more clarification
625			Please define the name of solution and purpose which are used currently	System	Debit Card Management System	Query needs more clarification
626			Please define the name of solution and purpose which are used currently	System	Credit Card Management System	Query needs more clarification
627			Please define the name of solution and purpose which are used currently	System	eKYC System vKYC System	Query needs more clarification
628			Please define the name of solution and purpose which are used currently	System	FI Solution/Gateway	Query needs more clarification
629			Please define the name of solution and purpose which are used currently	System	Mail Server	Query needs more clarification
630			Please define the name of solution and purpose which are used currently	System	SMS Gateway	Query needs more clarification



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631			Please define the name of solution and purpose which are used currently	System	Chatbot/Chat tool	Query needs more clarification
632			Please define the name of solution and purpose which are used currently	System	HRMS	Query needs more clarification
633			Please define the name of solution and purpose which are used currently	System	Analytical/BI	Query needs more clarification
634			Please define the name of solution and purpose which are used currently	System	MIS	Query needs more clarification
635			Please define the name of solution and purpose which are used currently	System	Data Warehouse	Query needs more clarification
636			Please define the name of solution and purpose which are used currently	System	AI/ML	Query needs more clarification
637			Please define the name of solution and purpose which are used currently	System	Cross sell System	Query needs more clarification
638			Please define the name of solution and purpose which are used currently	System	Enterprise Service Bus/API engine	Query needs more clarification
639			Please define the name of solution and purpose which are used currently	System	ETL Tool	Query needs more clarification



640			Please define the name of solution and purpose which are used currently	System	Any other?: (Please mention)	Query needs more clarification
641			Please define the name of solution and purpose which are used currently	System	Is reporting DB required or not?	As per Bidder's architecture
642				Architecture	Is there a specific preference of bank for the type of Kubernetes/Container technology?	Proposed solution should meet the intent of the RFP
643				Deployment	What is the preferred form of deployment strategy planned for CRM Private Cloud or Public cloud?	Bidder to refer Corrigendum-2.
644				Deployment	In case Canara Bank is looking for Private Cloud, do you have a private landing zone?	Bidder to refer Corrigendum-2.
645				Deployment	In case Canara Bank is looking for Public cloud deployment, is there any preferred cloud provider (AWS/MS Azure/GCP)?	As per the RFP terms
646				Deployment	Is there any Bank's existing system such as CBS, BPM, DMS, LOS etc deployed over Cloud? If yes, then please specify System details and name of Cloud vendor?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
647				CI/CD	What is the tool Canara Bank uses for CI/CD pipeline? We understand that pipeline creation & maintenance will be done by Canara Bank, and we shall support and guide Canara Bank IT team for the same.	Bidder to comply with RFP terms and conditions.
648				Infra	Do you require DR with 50% or 100% capacity of Production?	100%
649				Infra	Where would the DC, DR sites to be considered?	Bidder to comply with RFP terms and conditions.
650				Infra	As per the RFP, the production environment require high availability. Please confirm.	Yes
651				Infra	Please share Purging policy percentage for volume data at the end of each year	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
652				Infra	Is DMZ required? (If system is to be accessed over internet as well)	Yes



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653				Infra	We support both MS SQL and Oracle. However, we understand that the bank is inclined towards Oracle Database only. Please confirm.	Bidder to comply with RFP terms and conditions.
654				Infra	As per our understanding, infra will be managed by Canara Bank or third party CSP. Please confirm the same.	Bidder to comply with RFP terms and conditions.
655				Integration	Do you have a Middleware/DWH in place? If Yes, kindly mention which. If No, kindly share Integration strategy.	Yes. Details will be shared with the selected bidder
656					Could you please provide the overall user persona/profiles details - Name and their roles across all functions/departments, role description and access required by them at functional level?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
657					Could you please specify total number of user expected in each function - Sales users, call center agents , branch users, Managers, Management etc	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
658					What are the total no of managers in each function like Sales, Call Center, Branch etc ? Would they be creating or just accessing/viewing record in the system?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
659					Are all Sales Users expected to have access to scoring models, predictive forecasting etc or would this be given to selected elevated /senior users?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
660					How many users across functions/departments are expected to have only read only access?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
661					Could you please specify total customer base/profiles that Bank currently has?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
662					What is the number of SMS, no of notifications, no of emails etc expected per month/per year to be sent to customers to understand the volume involved?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
663					Is there need for BOT for customers? If yes, would is the expected customers interacting(may be basis the interactions at website level)	Bidder to comply with RFP terms and conditions.
664					Could you please provide the split in terms of Agents User bases as per below: Total Agents: Agents support chat channels: Agents support social channels: Agents supporting all channels: Managers of Agents:	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.



665					How many users would need access to both sales/service access ? Persona wise split and expectations on access would be really helpful	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
666					How many users would be involved in creating custom reporting/Dashboards for the entire user groups?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
667					How many users are expected to view/consume the reports/dashboards - would it be entire users or limited to privileged users/managers etc?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
668					Any storage requirement? If the existing database, file and log storage capacity details could be shared with us.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
669				The bank has asked for unlimited users with 5000 concurrent users.	For a SAAS product, unlimited users concept doesn't apply as the entire backend infra and scale will be managed by the OEM, Request the bank to help us with no. of active users (users who would be working on CRM i.e. like Field officers, Call centre team, etc who will be editing the details in the CRM based on customer conversation) and no. of users who would only view or monitor the CRM details. This would help us to prepare the solution according to the inputs from the bank	Bidder to refer Corrigendum-2.
670				N/A	Could you please share high level documentation on use-cases for lead onboarding journeys & Debt collection journeys, Opportunity Management systems?	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
671				N/A	Please confirm if document generation in scope for generating onboarding / welcome kits or other documents. If yes, please mention the there is any tool in existing technology stack.	Bidder to comply with RFP terms and conditions.
672				N/A	Please confirm if eSign is in scope. If yes, please mention if any 3rd party tool has been considered.	Bidder to comply with RFP terms and conditions.
673				N/A	Please elaborate on expectations of offline upload capabilities.	Bidder to comply with RFP terms and conditions.
674				Encryption	Assumption: Salesforce SHIELD will be utilized.	No query posted
675				Integration	What is Bank's integration roadmap? Will it be ESB or direct API integration? Our recommendation is through ESB.	Bidder to comply with RFP terms and conditions. Details will be shared with the selected bidder.
676					Apps and websites on which MoEngage will be implemented	Beyond the scope of RFP
677					How many unique users are targeted in a month	Beyond the scope of RFP

Date: 02/05/2023  
Place: Bengaluru

Assistant General Manager

