

Response to pre-bid queries: - RFP#29/2023-24 for Supply, Installation, Customization and Maintenance of end-to-end Customer Relationship Management (CRM) Solution in Bank (Pre-Bid meeting dated 11.12.2023 11:00 hours)



With reference to RFP Ref No. 39/2023-24 (GEM/2023/B/4327076) dated 11.12.2023 published on GeM portal and our website <https://www.bankofmaharashtra.in>, and pre-bid meeting was conducted as per schedule on 20.12.2023 at 15:00 hours.

Representative from potential bidders attended the meeting. Bank welcomed all the participants. Concerns of all the participants were deliberated during the meeting.

Responses to pre-bid queries and general queries are enclosed herewith as Annexure 1 and 2 respectively.

Note- Except changes mentioned above and as part of pre-bid responses, there is no change in any clauses, terms & conditions of the RFP document.

**Sd/-
Asst. General Manager
Information Technology**

Annexure – 1: responses to pre-bid queries

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1	3	e	ANNEXURE 23- SCOPE OF WORK	Product Certification training shall be provided by OEM mandatorily	Please provide more details on this request	The training as per the RFP requirement should be provided by the OEM and upon completion of the training, certificate to each participant should be given for the Product.
2	8	2	INVITATION FOR TENDER OFFERS	Last Date and Time for receipts of tender offers	Considering the functional, technical requirements and the list of pre-bid queries, we would seek & request an extension to submit the response including the Annexures & supporting documents, as requested by BOM	Please refer corrigendum for revised date of submission.
3	8	Section 2	INVITATION FOR TENDER OFFERS	EMD = 40 Lakhs	The EMD is mentioned as 40 Lakhs, but in GEM Bidding document it is stated as 20 Lakhs and can be paid online. Please clarify	Please refer corrigendum for clarity on EMD which shall be 20 Lakh only

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4	8	2. INVITATION FOR TENDER OFFERS	INVITATION FOR TENDER OFFERS	Time and Date of Opening of technical bids : 02/01/2024 at 17:30 hours	Since the pre-bid meeting is scheduled on 20-Dec-2023, and assuming the Bank will need another few days to share responses to bidder's queries, it will leave the bidder with only 1 week time to account for the suggested changes, make necessary adjustments, seek internal approval and respond to RFP . Hence, we request you to kindly consider extending the deadline for RFP response submission by 3-4 weeks.	Please refer corrigendum for revised date of submission.
5	8	2	Invitation for Tender Offers	Last Date and Time for receipts of tender offers	We request the bank to consider a 4 week extension to allow us to submit a better proposal to you	Please refer corrigendum for revised date of submission.
6	14	3.10. SCRUTINY OF OFFERS & EVALUATION PROCESS	3. INSTRUCTIONS TO BIDDERS	The Bidder with Highest Techno Commercial Score (S) shall be declared as Successful bidder (H-1 bidder)	1. Post technical evaluation, will the technically qualified bidders go for reverse auction and evaluated basis QCBS (80:20) evaluation? Kindly confirm 2. We request Bank to ensure that they disclose the technical score before Reverse Auction and QCBS?	1. Reverse Auction is not applicable for the tender under consideration. The commercials submitted by the bidder on GeM Portal during bid submission will be considered for

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						evaluation under QCBS 2. OCBS evaluation will happen as per GeM process online without manual intervention. Bank is first required to upload the evaluation results along with technical scores on GeM Portal. post which GeM performs QCBS evaluation on the scores submitted by the Bank and Commercials submitted by the Bidder.

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7	16	Section 3.16	Location of Project Implementation	This tender is being floated by the Head office of Bank. The Project Implementation location will be Pune	Is the proposed solution primarily used at the head office or across regions? If so, please share the details of branches along with the user base.	The solution will be used at all the office across Nation. Bank is expecting enterprise license hence there should not be any restriction on number of branches / users. However, for own consumption, bidder may refer Bank's website as requested information is available publicly.
8	18	3.22	EMD	DD can be of any date between Date of RFP and Due date for bid submission, DD must be valid for three months from the date of its issuance.	We request the Bank to accept EMD can also be through online payment	Please refer Gem bidding document section "Buyer Added Bid Specific Terms and Conditions" Point no 3 for online

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						remittance of EMD.
9	18	3.22	EMD		can we submit udayam Certificate for getting EMD Exemption for Small and micro Enterprise	EMD Exception shall be applicable as per General Terms and Conditions on GeM 4.0 (Version 1.12) dt 16th August 2023. It is bidder's responsibility to comply with GeM terms and conditions and provide appropriate documents to avail such exception, wherever required.
10	18	3. 21. PREFERENCE FOR PUBLIC PROCUREMENT (Preference	3. INSTRUCTIONS TO BIDDERS	Also in view of DPIIT OM No. P-45021/102/2019-BE-II-Part (1) (E-50310) dated 04.03.2021, The cost of transportation, insurance, installation, commissioning, training	Please clarify how Bank will differentiate between class 1 and class 2 vendors?	The same shall be decided based on the local content

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		to Make in India):		and after sales service support like AMC/CMC etc. will not be taken into account for calculating local content in any item		certificate submitted by the bidder and the criteria as defined under Public Procurement (Preference to Make In India) Order issued by the Gol.
11	21	Section 4.3	Solution Integration with Security Information & Event Management (SIEM)	It would be bidder's responsibility to integrate proposed solution with existing SIEM and EFRMS Solutions deployed by the Bank to generate alerts for any violations including IT Cyber Security related violations.	Please let know the capabilities of integration with SIEM and EFRMS solution via REST API or other modes?	SIEM & EFRMS will have REST API's. however, if any use case requires approach other than API, bidder is expected to support respective service provider for integration
12	21	4.3 SOLUTION INTEGRATION WITH SECURITY INFORMATION & EVENT	4. SCOPE OF WORK	It would be bidder's responsibility to integrate proposed solution with existing SIEM and EFRMS Solutions deployed by the Bank to generate alerts for any violations including IT Cyber Security related violations. Bidders are expected to support the	Which system do you currently have? Are APIs for the same available or not? If not, then we request the bank to provide the same. Kindly confirm.	System Details will be shared with successfully bidder. SIEM & EFRMS will have REST

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		MANAGEMENT (SIEM)		Bank to send logs from the proposed configuration in an acceptable format to the existing SIEM solution or any such alert management solution implemented by the Bank during contract period of proposed solution without any additional cost		API's. however, if any use case requires approach other than API, bidder is expected to support respective service provider for integration
13	22	6.1 GENERAL	6. TERMS AND CONDITIONS	The Successful Bidder should adhere to the terms of this tender document and would not accept any deviations to the same. If the Bidders have absolutely genuine issues only then should they provide their nature of non-compliance to the same in the format provided in Annexure 14. The Bank reserves its right to not accept such deviations to the tender terms.	Per the bank's stipulation allowing deviations from the bidder, we kindly request clarification on the methodology for scoring the bid subsequent to the inclusion of these deviations. A clear understanding of this process will facilitate our alignment with the evaluation criteria and ensure accurate submission in accordance with your requirements.	Conditional/ bids with deviation are not encouraged and the same are liable to get rejected. However, if still bidder would like to submit the bid with deviations, the decision of evaluation committee will be final in this regards.
14	22	5.1.1 ELIGIBILITY	5. QUALIFICATION	Bidder is required to meet all the eligibility criteria applicable to them	We request the Bank to ensure verification of these documentary	The Bank's evaluation

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		OF THE BIDDER	ION CRITERIA	and provide adequate documentary evidence for each of the criteria stipulated	evidence by way of organising reference visits.	committee would conduct the evaluation and may visit the actual sites/ customers premise for verification.
15	25	6 TERMS AND CONDITIONS	Performance Bank Guarantee (10%)	The successful bidder should furnish a Performance Bank Guarantee to the extent of 10 % of the value of the contract within 30 days of the date of receipt of the purchase order/Indent. The Performance Bank Guarantee has to be submitted in the format as required by the Bank. The performance guarantee would be for the entire period of the Contract plus 6 months. If the Performance guarantee is not submitted, the Bank reserves the right to cancel the contract. The Performance Guarantee would be returned to the bidder after the expiry or termination of the contract	We are an MSME company and would request to the Bank to provide an exemption on this clause or consider the PBG 10% only on the implementation amount not on the total value of the project.	No Change in RFP Clause
16	25	6.9 PERFORMANCE BANK GUARANTEE (10%)	6. TERMS AND CONDITIONS	The successful bidder should furnish a Performance Bank Guarantee to the extent of 10 % of the value of the contract within 30 days of the date of receipt of the purchase order/Indent	We request the bank to consider PBG to be maximum of 3% of the total contract value.	No Change in RFP Clause
17	26	Section 6.18	Supplier BCP	Bidder shall maintain business continuity, as per agreed business continuity plan	As the request is more of on-premise in Bank's infrastructure, the BCP plans and the maintenance may not	Bidder will be responsible for activities

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					be fully owned by Bidder. It has to be reviewed and only then the ownership can be agreed upon	which pertains to the bidder's scope
18	27	Section 6.21	Compliance with Master Directions on outsourcing of IT services	The bidder shall comply with the guidelines issued by RBI for outsourcing of IT services as per RBI Circular No: RBI/2023-24/102/DOS.CO.CSITEG/Sec.1/31.01 .015/2023-24 dated: 10.04.2023 or any subsequent guidelines issued in this regard	The Bidder will comply with the RBI guidelines, but if there are any specific clauses or version of guidelines, it has to be reviewed by Bidder and mutually agreed with Bank	RFP is self-explanatory
19	27	Section 6.23	Support	Any components, including the software deliverables / hardware equipment that are reported to be done on a given date should be repaired / replaced with identical or higher configuration within 24 hours at no extra cost to the Bank. The same should be made operational within 36 hours. The timeliness provided in this section pertains to replacement of redundant components. However, the bidder has to maintain the required uptime.	As the solution is requested for on-premise model, the replacement of hardware equipments has dependencies with the Bank and the SLA cannot be fully owned by the Bidder. The SLA timelines and clauses has to be reviewed and mutually agreed by both parties	Bidder will be responsible for activities which pertains to the bidder's scope.
20	27	6.23.b SUPPORT	6. TERMS AND CONDITIONS	The bidder should provide the support Facility Management Services as per the facility management clause in scope of work.	1. We request the Bank to share their expectations here. 2. Are you expecting a T1?	Please refer ANNEXURE 21: COMMERCIAL BID FORMAT "B. Cost of Manpower for onsite / production

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						support for 5 years for details"
21	29	6.26.1 TERMINATION	6. TERMS AND CONDITIONS	The Bank shall be entitled to terminate the agreement with the bidder at any time by giving Thirty (30) days prior written notice to the bidder without assigning any reason	The Bank has to provide reason and time to resolve all the issues before initiating termination.	No Change in RFP Clause
22	30	Section 6.28	Intellectual Property Rights	All Intellectual Property Rights in the Deliverables (excluding Pre-existing Material or third party software, which shall be dealt with in accordance with the terms of any license agreement relating to that software) shall be owned by Bank.	The proposed CRM solution is fully owned and developed by the Bidder and the IPR/source code cannot be shared with the Bank.	Customizations and Capabilities build by the bidder for the Bank will be owned by the Bank including IPR. It is noted that CRM Product is a licensed product and IP remains with the OEM

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23	31	6.33 LIQUIDATED DAMAGES	6. TERMS AND CONDITIONS	Penalty for delay in the Service(s) rendered for each week of delay beyond the scheduled date or part thereof will be a sum equivalent to 1% of the cost of the deliverables for the respective implementation phase for delay of one week or part thereof (more than 3 days shall be considered as a week), subject to maximum of 10 % (Ten percent) of the total PO value. In case of undue delay beyond a period of 15 days after attaining the maximum penalty of 10% of total project cost/TCO during implementation, Bank may consider termination of the contract or purchase order	We request the bank to cap the penalty to 3% of the PO/Total Contract Value.	No Change in RFP Clause
24	40	Section 6.52	Escrow Arrangement	The Bank and the successful bidder shall agree to appoint an escrow agent to provide escrow mechanism for the deposit of the source code for the CRM Solution supplied/ procured by the successful bidder to the Bank	The proposed CRM solution is fully owned and developed by the Bidder, the IPR/source code cannot be shared with the Bank or may enter in Escrow arrangement. The solution is a built using proprietary framework and the Bidder will not be able to share the source code.	Any customizations done on behalf of the bank will be property of the bank including IPR. Escrow arrangement shall be required as per RFP terms

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25	40	6.52 Escrow Arrangement	6. TERMS AND CONDITIONS	The Bank and the successful bidder shall agree to appoint an escrow agent to provide escrow mechanism for the deposit of the source code for the CRM Solution supplied/ procured by the successful bidder to the Bank in order to protect its interests in an eventual situation. The Bank and the successful bidder shall enter into a tripartite escrow agreement with the designated escrow agent, which will set out, inter alia, the events of the release of the source code and the obligations of the escrow agent. Costs for the Escrow will be borne by the successful bidder. As a part of the escrow arrangement, the final successful bidder is also expected to provide a detailed code documentation of the Audit software solution which has been duly reviewed by an external independent organization/ consultant of the bank. The successful bidder shall maintain the Software libraries and ensure all future upgrades and Customizations are effected in the escrow copy maintained as a part of the escrow arrangement till the Contract Period.	Source code is Salesforce proprietary information. We would request bank to provide waiver on this requirement.	Customizations and Capabilities built for the Bank are Bank IP. CRM Product is a licensed product and IP remains with the OEM. However, Escrow arrangement will be required to be adopted as per RFP requirement

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26	40	6.52	Escrow Management	Costs for the Escrow will be borne by the successful bidder.	We request the Bank to borne the escrow Charges since bank will be already having Escrow Vendor	Please refer corrigendum for revision in Escrow agent selection and payment responsibilities
27	40	6.52 ESCROW MANAGEMENT	6. TERMS AND CONDITIONS	The Bank and the successful bidder shall agree to appoint an escrow agent to provide escrow mechanism for the deposit of the source code for the CRM Solution supplied/ procured by the successful bidder to the Bank in order to protect its interests in an eventual situation.	Does bank have any choice or use any escrow management for there existing systems	Bank does not have any specific choice. Please refer corrigendum for revision in Escrow agent selection and payment responsibilities
28	40	6.52	Escrow Arrangement	The Bank and the successful bidder shall enter into a tripartite escrow agreement with the designated escrow agent, which will set out, interalia, the events of the release of the source code and the obligations of the escrow agent. Costs for the Escrow will be borne by the successful bidder	1. We already have a selected Escrow Vendor with whom we execute most of our contracts (with Banks), so please allow to do the BOM Escrow with the same vendor.2. Escrow arrangement cost needs to be born by the Bank.	Please refer corrigendum for revision in Escrow agent selection and payment responsibilities
29	41	Section 6.54	Source Code Audit	Source Code Audit	The Bidder shall accept for Source code audit based on the following	No Change in RFP clause

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					<p>terms:</p> <p>a) The request for audit has to be raised atleast 1 month in advance</p> <p>b) the audit should be inline with ISO 27001 compliance</p> <p>c) the bidder shall accept for one audit in a year and if there are any additional audits it may incur cost</p> <p>d) any audit with respect to data center of Bidder will not be applicable due to security reasons.</p>	
30	42	Section 6.1 and section 6.58	ISMS Framework	The Bidder shall abide by the Information Security Management System(ISMS) framework of the Bank.	The Bidder shall review the ISMS framework of the Bank and if any deviations, shall review with the bank and mutually agree for the next steps.	Noted
31	42	6.58 Solution Integration with SIEM	6. TERMS AND CONDITIONS	It would be bidder's responsibility to integrate proposed solution with existing SIEM and EFRMS Solutions deployed by the Bank to generate alerts for any violations including IT Cyber Security related violations. Bidders are expected to support the Bank to send logs from the proposed configuration in an acceptable format to the existing SIEM solution or any such alert management solution implemented by the Bank during contract period of proposed solution without any additional cost.	We would request Bank to make APIs available for SIEM and EFRMS system.	Please refer to response of query 38 for clarity.

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32	43	Section 6.65	Future additions of Hardware / Software	Bank would have the right to: a) Shift the supplied system/solution to an alternate site of its choice	The Bidder may not be fully own the request to shift to alternate sites of bank choices, but may support with the request and only on prior notice and written agreement.	Noted
33	44	Section 6.66	Completeness of Installation	The entire solution will be accepted after complete commissioning of solution and satisfactory working of the entire equipment for a minimum period of 10 days	The timelines of commissioning of solution depends on existing Bank's infrastructure and eco-system and the Bidder cannot commit prior to the discovery phase. The timelines shall be reviewed and mutually agreed by both parties.	Bank has only defined the timeline for which solution should work satisfactorily. Hence, no change in RFP Clause
34	52	12	ANNEXURE 6 : DETAILS OF THE BIDDER	Names and addresses of the principal bankers with whom major credit facilities (fund/ non-fund) are being enjoyed (Also mention names of the banks in consortium, names of the contact officials of the bank, phone number & email IDs)	Kindly elaborate the requirements	Bidder is expected to share the details of Banks from where various fund and nonfund based facilities are being availed.

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35	56	Annexure 9	Proposed Team Profile	Proposed Team Profile	The Bidder shall ensure the best team shall be assigned for the implementation and support of the project for Bank. The exact list of team members may not be shared, as the Bidder cannot allocate the resources or hold till the contractual stage and there will be some changes.	High level team profiles will be needed at the time of technical evaluation. However, bank reserves the right to evaluate the exact team member at the time of finalization for H1 Bidder. Exact team member list will be preferable.
36	56	PROPOSED TEAM PROFILE	ANNEXURE 9 : PROPOSED TEAM PROFILE	Map the Projects Team Profile here with Proposed Scope	Sample profiles will be provided. Final resources will be decided and finalised based on actual start of the project.	High level team profiles will be needed at the time of technical evaluation. However, bank reserves the right to evaluate the exact team member at the time of finalization for H1 Bidder.

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						Exact team member list will be preferable.
37	77	1	Annexure 21- Commercial Bid Format	Enterprise License Cost (A)	Please clarify the number of users (maximum) that would be accessing the solution. While the solution can be deployed on-prem, for SaaS based model, we would like to know the number of users. This will also have an impact on the proposed hardware sizing	Bank's requirement is self-explanatory i.e. solution with enterprise license without restriction on the number of users. Bidder for its sizing purpose may factor appropriate number of users based on its experience. However, Bank will not pay any extra cost in case of increase in the user count
38	77	Annexure 21	Commercial Bid Format	Enterprise License Cost (A)	The Enterprise License Cost is provided more of one time and if the	Bank's requirement is

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					proposed in a SaaS based model, it may be recurring cost. Please share the list of users that will use the CRM platform along with the department/user type count.	self-explanatory i.e. solution with enterprise license without restriction on the number of users. Bidder for its sizing purpose may factor appropriate number of users based on its experience. However, Bank will not pay any extra cost in case of increase in the user count
39	77	Annexure 21	Commercial Bid Format	TCO	As the Commercial evaluation is based on L1 or RA, will the TCO be the final value for consideration or does it include other factors too (like Total of A, D and F tables)?	The final totals from various tables like A, B, C, D, E, F, should be summarized under summary TCO Table with year wise breakup. The

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						value under TCO under summary table Sn 7 will be considered for evaluation purpose.
40	80	ANNEXURE 22	Technical Evaluation Criteria	Product Expertise and Experience	How the product expertise would be scored here. Experience we shall submit the same based on our credentials	The evaluation would be based on Overall assessment by the Bank's committee
41	80	NOTE: C	ANNEXURE 22- TECHNICAL EVALUATION CRITERIA	In case there is only one bidder having technical score of 70% or more, the Bank may, at its sole discretion, also consider the next highest technical score and qualify such bidder	Kindly explain whether the 70% cut off is on overall scoring or for every individual parameters	Cut-off is on overall score.
42	80	4&5	ANNEXURE 22- TECHNICAL EVALUATION CRITERIA	The technical bid submitted by the Bidder will be evaluated only if they fulfil the eligibility criteria. The proposal evaluation will be based on the evaluation matrix consisting of the following parameters. 1 Product Expertise and Experience 2 Technical Specifications Compliance 3 Functional Specifications Compliance	Kindly share an indication of how much time gap can be expected between bid document submission and presentation?	Expected time is within 1 to 2 months



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				4 Technical Presentation 5 Solution Demonstration		
43	81	1 - Product Expertise and Experience	Annexure 22- Technical Evaluation Criteria	For each live solution in more than 1 Schedule Commercial Bank in India, includes customer References and feedback (Based on Site Visit) (5 Marks for each implementation subjected to Max 20 Marks)	Requesting the Bank to change this criteria for having deployment at any BFSI organization with more than 1000 branches rather than scheduled commercial bank. This way, the Bank will be able to evaluate quality bids from strong vendors. Currently only one large CRM vendor in India will be able to meet the criteria set by the Bank	Please refer corrigendum for revised clause
44	81	EVALUATION PARAMETERS > 1 > PRODUCT EXPERTISE AND EXPERIENCE	ANNEXURE 22- TECHNICAL EVALUATION CRITERIA	For Level of Expertise and skill set for the Dedicated Team assigned this project	Requesting bank to update Bidder Company's capability/strength and Ability & experience of the proposed Engagement Team handling proposed project as Bidder/OEM Company's capability/strength and Ability & experience of the proposed Engagement Team handling proposed project	No Change in RFP clause

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45	81	1	ANNEXURE 22- TECHNICAL EVALUATION CRITERIA	<p>Level of Expertise and skill set for the Dedicated Team assigned this project</p> <p>Bidder Company's capability/strength and Ability & experience of the proposed Engagement Team handling proposed project</p> <p>15 Marks – if the Proposed Project team has implemented in more than 3 PSU/Private Sector.</p> <p>10 Marks – if the Proposed Project team has implemented in more than 2 PSU/Private Sector.</p> <p>5 Marks – if the Proposed Project team has implemented in more than 1 PSU/Private Sector.</p>	<p>1. Can you please share the details of the criteria for obtaining 20 marks for 'Level of Expertise and skill set for the dedicated Team assigned on this project" as the explanation is provided for 15,10 & 5 marks</p> <p>2. Is there any specific requirement for the team and team structure by the bank</p> <p>3. Is it any PSU/Private Sector Implementation or PSU/Private Sector CRM Implementation</p>	<p>Please refer corrigendum for revised scoring criteria</p>

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46	81	EVALUATION PARAMETERS > 1 > PRODUCT EXPERTISE AND EXPERIENCE	ANNEXURE 22- TECHNICAL EVALUATION CRITERIA	For each live solution in more than 1 Schedule Commercial Bank in India, includes customer References and feedback (Based on Site Visit) (5 Marks for each implementation subjected to Max 20 Marks)	Kindly specify the modules which will be considered for relevant CRM Implementation. Such as, for bank X if only lead module has been implemented as part of CRM journey will it be considered as a relevant experience in CRM implementation	No change in the RFP clause. Bank may also consider the CRM solution where few modules have been implemented.

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47	85	ANNEXURE 23- SCOPE OF WORK	Marketing Campaign Management		How many customer facing properties does the bank have? Eg: Websites, Apps	some of the important customer facing properties are IB MB Tablet WhatsApp SMS POS UPI
48	85	ANNEXURE 23- SCOPE OF WORK	Marketing 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. REST API's will be provided.
49	85	ANNEXURE 23- SCOPE OF WORK	Marketing Campaign Management		Which IVR solution is the bank currently using?	In-house built, REST API integration will be provided
50	85	ANNEXURE 23- SCOPE OF WORK	Marketing Campaign Management		Attachment open counts of the attachments inside email cannot be viewed? Links inside an email can be tracked.	Noted and will be discussed with the successful bidder
51	85	1. Broad Scope	ANNEXURE 23- SCOPE OF WORK	The solution stack shall comprise of best of the breed solutions to meet and exceed the business requirements.	As cloud solution are considered best of breed due to it's ability to support the latest advancements of computing, would Bank of Maharashtra be open to prioritizing Cloud Based solutions?	Bank expects Cloud ready platform deployed On-Prem with future capability to

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						Migrate to the Cloud.
52	85	Lead and Opportunity Management	ANNEXURE 23- SCOPE OF WORK	AI / ML based cross-sell / up-sell triggers	Given the cloud's superior support for advanced computing and AI/ML's high compute demands, we suggest Bank of Maharashtra prioritize cloud-based solutions. These solutions offer scalability for AI/ML and robust data management. We strongly recommend the bank consider this transition to harness these capabilities.	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.
53	85	Marketing Campaign Management	ANNEXURE 23- SCOPE OF WORK	Ability to create customer profile basis customer transactions, behavioral data and interaction data	How many different application within the Bank's echosystem can contain the Information of an Individual Customer that needs to be consolidated to create a unique Profile?	CBS, DLP, LLMS, KYC Hub
54	85	Annexure 23	1. Broad scope	i). Lead and Opportunity Management	Request Bank to please clarify if Bank is already using any AI tools for Lead scoring/Cross Sell upsell recommendations with which the CRM needs to be integrated or Bank is expecting the CRM solution to have the AI capabilities?	Presently, No such AI based tool is used. But bidder is expected to provision the same in proposed CRM solution as per scope of RFP.
55	85	Annexure 23	1. Broad scope	i). Lead and Opportunity Management	Request Bank to clarify what other channels from which the leads are needs to be captured? Like Outbound calling, Internet	Digital Marketing Campaigns, Outbound

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					Banking/Mobile Banking, Chatbot etc?	Calling, IB / MB / Website
56	85	Annexure 23	1. Broad scope	i). Lead and Opportunity Management	Request Bank to clarify if Bank is already using any kind of Social Listening/media tool with which the CRM needs to be integrated?	Presently, no such solution is used
57	85	Annexure 23	1. Broad scope	i). Lead and Opportunity Management	Request Bank to clarify what are the lead assignment rules typically Bank follows? Like, Round Robin, Product based, Customer type etc?	Detailed requirements to be finalized with the successful Bidder
58	85	Annexure 23	1. Broad scope	i). Lead and Opportunity Management	Request Bank to clarify the number of products for which lead life cycle flows need to be considered?	All Banking products are expected to be covered. Exact details will be shared with successful bidder
59	85	1. BROAD SCOPE	ANNEXURE 23- SCOPE OF WORK	Creating customer – centric culture and organization	As per our understanding, customers will be created (CIF and Account Number) in the CBS. CRM will fetch the customer data and display on Customer 360. CRM will also convert Lead/ Prospects into new Customers based on the flow defined by the bank. Please clarify our understanding.	Bidders understanding is correct

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60	85	NA	ANNEXURE 23- SCOPE OF WORK	Solution shall also be accessible with low bandwidth consumption across all branches of the Bank	What's the current bandwidth and where are these branches based?	Presently, Majority of branches are provided with 2Mbps MPLS Links with backup for same capacity
61	85	C	ANNEXURE 23- SCOPE OF WORK	System shall facilitate easy integration by either providing API or capability to consume APIs. Integration to be done with different subsystems like Existing CRM module, CBS (Bancs 24), Internet Banking, Mobile Banking App, LLMS, Website, Email Gateway, SMS Gateway, ESB Platform etc.	Integration is possible, how many of these apps are online or on-prim?	On Premise applications at the Bank
62	85	D	ANNEXURE 23- SCOPE OF WORK	Social Media Integration (Facebook, WhatsApp, Instagram etc.) Plugin for Lead, Customer Service & Customer 360 Module	Need more understanding on the touchpoints for integration?	RFP Clause is self-explanatory.
63	85	Annexure 23	Broad Scope	Analysis of lead captured from third party and of non-bank customers	Does Bank using any Analytics platform?	No Solution is used currently by Bank
64	86	ANNEXURE 23- SCOPE OF WORK	Marketing Campaign Management	Ability to use customer profile data to match campaigns and mechanisms of campaign execution	Please provide an example	Banks can segment customers based on various criteria like demographics , transaction behaviour, and product

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						usage, enabling targeted marketing and personalized service.
65	86	Sales Process Management	ANNEXURE 23- SCOPE OF WORK		Is the Retail sales and Corporate Sales hierarchy different?	Yes, it is different
66	86	Customer Interaction Management	ANNEXURE 23- SCOPE OF WORK		How many Marketing & Transactional messages are sent by bank per month?	The details will be shared with successful bidder.
67	86	Case Management and Customer Self-Service	ANNEXURE 23- SCOPE OF WORK		How do the different teams of the Bank currently collaborate to solve customer service requests?	Presently, there is no integrated platform available. Email, WebEx, Conference Call, Ticketing Portals are used for referring information and discussing the issue.
68	86	Case Management	ANNEXURE 23- SCOPE OF WORK		Would the bank be prioritizing a solution that Integrates their System of Productivity such as Email and	Yes

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		and Customer Self-Service			Internal Messaging clients with their System of Records like the CRM to improve teams collaboration and Productivity?	
69	86	Case Management and Customer Self-Service	ANNEXURE 23- SCOPE OF WORK		Is Gen AI based CoPilot be a priority for the Bank to improve Customer Service Agent's Productivity?	Bidder is expected to design and provision appropriate components to deliver the solution as per scope defined in RFP.
70	86	Case Management and Customer Self-Service	ANNEXURE 23- SCOPE OF WORK		Does the bank see value in a solution that comes with Integrated Generative AI based Conversation Agent that can improve the FTR rate of the Customer Requests?	Bidder is expected to design and provision appropriate components to deliver the solution as per scope defined in RFP.
71	86	Case Management and Customer Self-Service	ANNEXURE 23- SCOPE OF WORK		How the documents being collected at present (soft copy, Hard copy etc?)	Soft Copy and Hard Copy, Both
72	86	Case Management and Customer Self-Service	ANNEXURE 23- SCOPE OF WORK		Does the Bank use OCR based systems to digitize the Documents?	Presently, there is not such platform used.

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73	86	Case Management and Customer Self-Service	ANNEXURE 23- SCOPE OF WORK		How long does it usually take on an average to create a new report?	Details will be shared with successful bidder
74	86	Annexure 23	1. Broad scope	ii). Marketing Campaign Management	Request Bank to clarify if Bank has any Customer Data Platform	No Solution is used currently by Bank
75	86	Annexure 23	1. Broad scope	iv) Customer Interaction Management	Request Bank if the Bank is using any Survey tools already with which CRM needs to be integrated with ? Of Bank expect the CRM to have Survey functionality	Presently, no such tool is used.
76	86	Annexure 23	1. Broad scope	v) Case Mamanagement and customer self servcie	Request Bank to Clarify what Omni channel solution (Mentioned in Page number 7) will be implementing and will it be ready for the CRM Integration.	Will be implemented in the future.
77	86	Annexure 23	1. Broad scope	v) Case Mamanagement and customer self servcie	Request Bank to clarify if the channel includes only Live chat solution integration or also with Chatbot (Mentioned in Page number 7) Bank is in the process of implementing	Includes Chabot
78	86	Annexure 23	1. Broad scope	v) Case Mamanagement and customer self servcie	How many Straight Through Processes (Auto Closure) Bank want to implement? Request Bank to help with the list of STPs	Will be discussed and finalized with the successful Bidder
79	86	Annexure 23	1. Broad scope	v) Contact Center Management	IVR calls generally recorded by the IVR/CTI solutions. Request Bank to clarify the expectations from the CRM system in this regard	Integration with IVR/CTI system, reporting and analytics

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80	86	Annexure 23	1. Broad scope	v) Analytics and Reporting	Is Bank using any Advanced Analytical tools like Tableau or Power BI with which CRM needs to be integrated	Presently, such tool is not used but Bank expects the bidder to include the same for future purpose.
81	86	1. BROAD SCOPE	ANNEXURE 23- SCOPE OF WORK	Contract management (creating, approving, updating contracts, etc.).	As per our understanding, contract management will be the part of separate contract management system outside CRM. We will integrate and fetch & display the contract details. CRM - Sales/Service/Marketing	Requirement is for Feet on Street Sales professionals Contract Management
82	86	1. BROAD SCOPE	ANNEXURE 23- SCOPE OF WORK	Knowledge base for customers (FAQs, troubleshooting guides, banking products and services descriptions, etc.).	As CRM is primarily an employee facing application, Knowledgebase will be provided for the bank employees for self-help and supporting the customer. However, kindly explain how bank wants to expose the knowledgebase to the customer.	Bank expects knowledge base to be exposed to Employees
83	86	Annexure 23	Case Management and Customer Self-Service	Multi-channel case creation (via call, mobile banking app, website live chat, website forms, etc.).	What is the expectation on Customer Self -Service?	RFP Clause is self-explanatory
84	86	Annexure 23	Case Management and Customer Self-Service	Multi-channel case creation (via call, mobile banking app, website live chat, website forms, etc.).	How chatbots in the website are integrated now?	Integration details will be shared with the successful Bidder

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85	87	ANNEXURE 23- SCOPE OF WORK	Analytics and Reporting		How Many users will Generate on the Fly /Dynamic Reports	5-10%
86	87	ANNEXURE 23- SCOPE OF WORK	Analytics and Reporting		How Many users will Consume the Reports	25%
87	87	ANNEXURE 23- SCOPE OF WORK	Analytics and Reporting		Which users are expected to Download and the Business Reasons behind downloading ?	Requirement needs to be met
88	87	ANNEXURE 23- SCOPE OF WORK	Analytics and Reporting		What is the Banks Existing Analytics Landscape? What is Used for MIS, what is Used as Data Warehouse? Where is the Data Warehouse Hosted ?	On-Prem Operational Data Store Reporting Platform
89	87	ANNEXURE 23- SCOPE OF WORK	Analytics and Reporting		If there exists any MIS Team ? is the team centralized and what is the Workforce strength of the Team ?	Detailed requirements to be finalized with the successful Bidder
90	87	ANNEXURE 23- SCOPE OF WORK	Analytics and Reporting		How Many Business Users need to create Dynamic Reports ?	Query already answered. Please refer reply to point number 55

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91	87	ANNEXURE 23- SCOPE OF WORK	Analytics and Reporting		Where is the Current Database/Datawarehouse Hosted ? On PRemise or On Public Cloud ?	On-Prem Operational Data Store Reporting Platform
92	87	Analytics and Reporting	ANNEXURE 23- SCOPE OF WORK		Does the Bank currently have a Data Warehouse?	On-Prem Operational Data Store Reporting Platform
93	87	Analytics and Reporting	ANNEXURE 23- SCOPE OF WORK		How many Reports does currently need to be manually compiled on a Regular Basis?	Details will be shared with successful bidder
94	87	Analytics and Reporting	ANNEXURE 23- SCOPE OF WORK		Do you have an Idea of the Hourly Effort that goes into creating and compiling Regular Reports?	Details will be shared with successful bidder
95	87	Annexure 23	1. Broad scope	v) Contact Center Management	What IVR/CTI solution the Bank is using?	In-house built, REST API integration available
96	87	1. BROAD SCOPE POINT c	ANNEXURE 23- SCOPE OF WORK	System shall facilitate easy integration by either providing API or capability to consume APIs. Integration to be done with different subsystems like Existing CRM module, CBS (Bancs 24), Internet Banking, Mobile Banking App, LLMS, Website, Email Gateway, SMS Gateway, ESB Platform etc	What are the existing CRM module(s) ? Does the bank intend to continue with existing CRM modules and integrate them with the new to-be implemented CRM?	Existing solution exists with very basic CRM functionality. All modules to be in newly implemented CRM

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97	87	1. BROAD SCOPE POINT f	ANNEXURE 23- SCOPE OF WORK	It would be bidder's responsibility to integrate proposed solution with existing Security Information and Event Management (SIEM) and Enterprise Fraud Risk Management System (EFRMS) to generate real time or near real time alerts. Proposed solution should be able to send logs in an acceptable format to the existing SIEM & EFRMS solution.	Please confirm our understanding: Bidder will not have the responsibility to generate alerts or maintaining rule engine when alert needs to be generated. Bidder will only facilitate the integration with existing SIEM & EFRMS.	Yes
98	87	1. BROAD SCOPE	ANNEXURE 23- SCOPE OF WORK	AI-powered chatbots to resolve customers' typical cases (difficulties with logging into a mobile banking account, password reset, etc.).	Is the bank looking for an AI powered chatbot or the bank has an existing chatbot which can be integrated with the CRM. Please clarify.	Existing Chabot from website
99	87	1. BROAD SCOPE	ANNEXURE 23- SCOPE OF WORK	IVR Calls to be recorded, monitored to check the quality of service provided to customers	As per our understanding, call recordings will be done and stored in the separate recording solution opted by the bank. The new CRM will be integrating with the recording solution. Please clarify.	Bidders understanding is correct
100	87	Annexure 23	Lead Management	Contact Centre Management	Please confirm if the Call centre is centralized for the bank & its users count?	Centralized
101	88	ANNEXURE 23- SCOPE OF WORK Point I	Analytics and Reporting	Deployment model of solution should be On Premise, and commercials has to be shared with details of commercials for each models on. Further any additional document required by the Bank in terms of data privacy, information security or geographic locations needs to be made available. This would not be construed as	Would request you to consider end to end CRM solution deployment on Public Cloud as well along with On premise model.	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.

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				alternative to Bank/Regulator's right to audit.		
102	88	Annexure 23	Analytics & Reporting	L. Deployment model of solution should be On Premise	Request Bank to clarify if this is w.r.t the Entire CRM solution or the Analytics and Reporting only?	Entire CRM solution
103	88	Annexure 23	Analytics & Reporting	L. Deployment model of solution should be On Premise	Is Bank open to consider the On cloud CRM Solution as it brings in lot of flexibility, Low Code no code capabilities along with future ready Gen AI and cognitive services?	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.
104	88	1. BROAD SCOPE POINT n	ANNEXURE 23- SCOPE OF WORK	Bidder shall ensure to provide fixes/resolution to the issues reported during VAPT/IS audit on an ongoing basis at no additional cost.	What will be the frequency of such audits?	Frequency of such audits is on quarterly basis. However, Bank may conduct audit on need basis based on regulatory directions.
105	88	1. BROAD SCOPEPOINT k	ANNEXURE 23- SCOPE OF WORK	Bidder shall be ready to showcase Bandwidth usage of the solution in Bank's network during technical	There will be increase in bandwidth with integration during testing & in production	-

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				presentation of the solution using native/vanilla version of the software		
106	88	1. BROAD SCOPE > POINT o	ANNEXURE 23- SCOPE OF WORK	Detailed plan should include the migration of existing customer data to the CRM Solution.	Is the scope restricted to data migration plan only or the data migration will be carried out by the bidder	Bidder is also expected to migrate data.
107	88	1. BROAD SCOPE	ANNEXURE 23- SCOPE OF WORK	Bidder shall provide the details of SDK capabilities available with the solution for customization/production configuration.	Being an enterprise CRM platform, we provide APK and not SDK, Requesting bank to amend the same.	Bidders understanding is correct
108	88	1. BROAD SCOPE	ANNEXURE 23- SCOPE OF WORK	Performance testing needed to be completed and report need to be shared as part of the delivery.	As per our understanding, performance testing will be carried out by the bank and if any improvement is needed, bidder will support to fix the issues identified. Please clarify	Performance Testing of the OEM Product need to be provided along with necessary documentation
109	88	K	ANNEXURE 23- SCOPE OF WORK	Bidder shall be ready to showcase Bandwidth usage of the solution in Bank's network during technical presentation of the solution using native/vanilla version of the software	Need more understanding on bandwidth usage for demonstration	bidder is expected to share the solution performance findings in the setup of similar size established /

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						maintained by the bidder.
110	88	L	ANNEXURE 23- SCOPE OF WORK	Deployment model of solution should be On Premise, and commercials has to be shared with details of commercials for each models on	Any specific reason for deploying On Premise???	Will be discussed with successful bidder
111	88	N	ANNEXURE 23- SCOPE OF WORK	Bidder shall ensure to provide fixes/resolution to the issues reported during VAPT/IS audit on an ongoing basis at no additional cost.	Fixes/resolutions released from Microsoft would be done automaticlaly in online version but for customization in both would be chargeable	VAPT / IS Audit issues need to be fixed without additional cost to Bank.
112	88	O	ANNEXURE 23- SCOPE OF WORK	Detailed plan should include the migration of existing customer data to the CRM Solution.	How much data are we considering? Industry's best practise is to start the system fresh, however 1-3 years data should be fine for audit or compliance purpose.	Around one year of existing Call Center Data
113	88	U	ANNEXURE 23- SCOPE OF WORK	The Bidder should ensure that the platform is scalable both vertically and horizontally without any customizations in the platform.	Customization is indeed required for scalability	RFP Clause is self-explanatory. No costs for meeting this requirement will be agreed to
114	88	Annexure-23 Point 3b	Broad Scope	Deployment model of solution should be On Premise, and commercials has to be shared with details of commercials for each models on. Further any additional	Request you to revise to 'Deployment model of solution should be On Premise (or) On Cloud'	Bank expects Cloud ready platform deployed On-Prem with

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				document required by the Bank in terms of data privacy, information security or geographic locations needs to be made available. This would not be construed as alternative to Bank/Regulator's right to audit.		future capability to Migrate to the Cloud.
115	89	Point V		Bidder should ensure to implement Online Dispute Resolution (ODR) System for Digital Payments. DPSS.CO. PD. No.116/02.12.004/2020-21; dated August 06, 2020.	The ODR guidelines has to be reviewed or shared with Bidder prior to ensuring the compliance	The guidelines requested are publicly available and reference to the same is already shared by the Bank.
116	89	1. BROAD SCOPE POINT ff	ANNEXURE 23- SCOPE OF WORK	Bidder shall ensure that the solution is user friendly and easy to use by bank staff. Bidder shall ensure to provide GUI Prototype/Functional Prototype / wireframes during BRD stage as required by Bank.	Are there any in-house tools that the Bank uses to create wireframes and UI/UX prototypes for the bidder to adopt during BRD stage?	No tools used currently
117	89	1. BROAD SCOPE	ANNEXURE 23- SCOPE OF WORK	Bidder should ensure to implement Online Dispute Resolution (ODR) System for Digital Payments. DPSS.CO. PD. No.116/02.12.004/2020-21; dated August 06, 2020.	Requesting bank to please clarify this requirement with an use case.	The bidder needs to integrate with the existing online dispute resolution system
118	90	oo	ANNEXURE 23- SCOPE OF WORK	The application software should be delivered within a maximum of FOUR MONTHS of issuing the Letter of Intent/ Purchase order	Four working months with multiple integration could be tight, can also provide real estimates only after the discovery and gap-fit analysis is done	Please refer corrigendum for revision in project

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						timeline clause "a"
119	91	2. TESTING AND ACCEPTANCE , p)	ANNEXURE 23- SCOPE OF WORK	The Bidder will be responsible for using appropriate tools for logging, managing, resolving and tracking issues and its progress, arising out of testing and ensuring that all issues are addressed in a timely manner to the satisfaction of the Bank and as per the requirements mentioned. Issue Tracker shall also be made available to Bank's team.	Is there any existing bug tracking tool that Bank is using which can be leveraged for this project	Requirements and Bug tracking tool implementation is in progress
120	91	2. TESTING AND ACCEPTANCE	ANNEXURE 23- SCOPE OF WORK	The successful bidder mandatorily shall have to provide training to Bank's 8-10 officials (separate modules for administrative users and business process users) preimplementation and post-implementation as per the Bank's requirement, as part of the scope of work.	We follow train the trainer approach and provide one time training to the bank. Please clarify how many trainings will be required to the bank.	Noted
121	93	4. WARRANTY AND SERVICE	ANNEXURE 23- SCOPE OF WORK	The Bidder shall provide one-year comprehensive warranty on-site support from the date of installation of software specified in the purchase order for all the supplied products	Warranty period must be for maximum 90 days only. We request bank to kindly change the clause.	No Change in RFP clause

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122	96	ANNEXURE 23- SCOPE OF WORK	Section 7. Infrastructure , point b	The proposed Platform shall be hosted on Bank's on premise infrastructure.However, Platform should have capability to migrate to any other platform as perthe Bank's requirement.	Would request you to consider end to end CRM solution deployment on Public Cloud as well along with On premise model.	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.

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123	96	Infrastructure	ANNEXURE 23- SCOPE OF WORK	The proposed Platform shall be hosted on Bank's on premise infrastructure. However, Platform should have capability to migrate to any other platform as per the Bank's requirement. with details of commercials for each models on	Is the Bank open to evaluate an Online/Cloud/SAAS Solution?	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.
124	96	1. BROAD SCOPE > 6.FACILITIES MANAGEMENT AND AMC/ATS > x	ANNEXURE 23- SCOPE OF WORK	Provide Bank with weekly hardware utilization/performance monitoring reports and alert the Bank in case of any performance issues by suggesting future capacity planning.	Hardware is provided and maintained by the Bank hence Bank should share the hardware utilization report. Based upon the report, if any performance tuning needs to be done then we will be able to take care of it.	Bank will extend its extending platform to share reports and generate alert. Bidder is expected to monitor and take appropriate steps based on criticality
125	99	ELIGIBILITY EVALUATION	Bidders' Eligibility Criteria	Bidder should have minimum average annual turnover of Rs. 50 Crores each during the last three financial years that is 2020-21, 2021-22 and 2022-23 as per audited financial statements. This must be individual company and not of any group of companies.	We would request waiver for this condition	No Change in RFP Clause

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126	99	ELIGIBILITY EVALUATION	Bidders' Eligibility Criteria	The bidder/ OEM/SI should have a valid ISO 9001 & ISO 27001 certificate for the solution proposed.	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 9001, Salesforce has Data Privacy controls and protection mechanisms to protect customer data in line with leading privacy law requirements. Details can be availed on https://www.salesforce.com/in/company/privacy/ Require relaxation on ISO 9001	No Change in RFP Clause
127	99	ELIGIBILITY EVALUATION	Bidders' Eligibility Criteria	Bidder should have minimum average annual turnover of Rs. 50 Crores each during the last three financial years that is 2020-21, 2021-22 and 2022-23 as per audited financial statements. This must be individual company and not of any group of companies.	We are registered under MSME and have started our operations across India for implementation and have been growing and increasing our head counts. We would request to reduce the turnover criteria to cap it 15 Cr.	Please refer GeM bidding Document Clause Number 1 under MII Compliance. Turnover is exempted If the bidder is a Micro or Small Enterprise as per latest definitions under MSME rules, the bidder shall be exempted from the requirement of

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						<p>"Bidder Turnover" criteria and "Experience Criteria" subject to meeting of quality and technical specifications. If the bidder is OEM of the offered products, it would be exempted from the "OEM Average Turnover" criteria also subject to meeting of quality and technical specifications. In case any bidder is seeking exemption from Turnover / Experience Criteria, the supporting</p>

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						documents to prove his eligibility for exemption must be uploaded for evaluation by the buyer.
128	99	2	ANNEXURE 24: ELIGIBILITY EVALUATION	Bidder should have minimum average annual turnover of Rs. 50 Crores each during the last three financial years that is 2020-21, 2021-22 and 2022-23 as per audited financial statements. This must be individual company and not of any group of companies.	Is this point applicable for only bidder. If yes, we kindly request you to make it bidder / OEM.	No Change in RFP

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129	99	ELIGIBILITY EVALUATION	ANNEXURE 23- SCOPE OF WORK	The bidder should have experience of implementing CRM Solution to at least two Public Sector Banks/Private Sector Banks in India with Minimum 1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP.	Requesting the Bank to consider Financial Services as a segment and global customers rather than only India Banks	No Change in RFP
130	99	4 of ELIGIBILITY CRITERIA COMPLIANCE TABLE	ANNEXURE 24: ELIGIBILITY EVALUATION	The bidder/ OEM/SI should have a valid ISO 9001 & ISO 27001 certificate for the solution proposed.	Can you please confirm if the ISO certificate is expected for solution or for the organization?	No change to RFP. Certification from Bidder (OEM or SI) Either will suffice
131	99	2 OF ELIGIBILITY CRITERIA COMPLIANCE TABLE	ANNEXURE 24: ELIGIBILITY EVALUATION	Bidder should have minimum average annual turnover of Rs. 50 Crores each during the last three financial years that is 2020-21, 2021-22 and 2022-23 as per audited financial statements. This must be individual company and not of any group of companies	Bank should consider keeping 150 Cr turnover to ensure quality and experienced vendor will participate	No Change in RFP Clause

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132	99	ANNEXURE 24: ELIGIBILITY EVALUATION	ANNEXURE 24: ELIGIBILITY EVALUATION	The bidder should have experience of implementing CRM Solution to at least two Public Sector Banks/Private Sector Banks in India with Minimum 1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP.	Requesting bank to kindly ammend the criteria to Complete CRM implementation and not single module implementation.	No change in the RFP clause. Bank may also consider the CRM solution where few modules have been implemented.
133	99	Annexure-24	Elgibility Evaluation	Bidder should have minimum average annual turnover of Rs. 50 Crores each during the last three financial years that is 2020-21, 2021-22 and 2022-23 as per audited financial statements. This must be individual company and not of any group of companies.	This seems to be on the lower side. Request you to revise it to INR 500Cr	No Change in RFP Clause
134	100	11	ANNEXURE 24: ELIGIBILITY EVALUATION	The bidder should have experience of implementing CRM Solution to at least two Public Sector Banks/Private Sector Banks in India with Minimum 1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP.	Requesting the Bank to change this criteria for having deployment one scheduled commercial bank with minimum 1000 branches. This way, the Bank will be able to evaluate quality bids from strong vendors. Currently only one large CRM vendor in India will be able to meet the criteria set by the Bank	Please refer corrigendum for revised clause

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135	100	ANNEXURE 24 & 11	Point # 11	The bidder should have experience of implementing CRM Solution to at least two Public Sector Banks/Private Sector Banks in India with Minimum 1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP.	Here we request you to make it as Bidder / OEM instead of only bidder	Suggestion not accepted but clause relaxed. Please refer corrigendum for revised clause
136	100	ELIGIBILITY EVALUATION	Bidders' Eligibility Criteria	The bidder should have experience of implementing CRM Solution to at least two Public Sector Banks/Private Sector Banks in India with Minimum 1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP.	We are an MSME company and have a presence in PAN India and we have strong capabilities in the Financial domain and have done extensive work as well and implemented multiple LOC and CRM cases. At present, we are working with cases for the BFSI domain and would request for relaxation in this clause to remove the number of branches and PSU Banks.	RFP offers relaxation to MSMES with respect to turnover. Hence, No Change in RFP Clause
137	100	11	ANNEXURE 24: ELIGIBILITY EVALUATION	The bidder should have experience of implementing CRM Solution to at least two Public Sector Banks/Private Sector Banks in India with Minimum 1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP	For the branch size here we kindly request you to make it 900+	Please refer corrigendum for revised clause

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138	100	ELIGIBILITY CRITERIA COMPLIANCE TABLE	ANNEXURE 24: ELIGIBILITY EVALUATION	Refer the 'ELIGIBILITY CRITERIA COMPLIANCE TABLE' Table	After eligibility criteria 8, eligibility criteria 10 is defined	It is a typo related to serial numbering. All the criteria mentioned in the Annexure are to be considered
139	100	Annexure-24	Legibility Evaluation	The bidder should have experience of implementing CRM Solution to at least two Public Sector Banks/Private Sector Banks in India with Minimum 1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP	Request you to revise it to The bidder should have experience of implementing CRM Solution to at least two Public Sector Banks/Private Sector Banks / Any other BFSI institutions in India with Minimum 500-1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP	Please refer corrigendum for revised clause
140	102	ANNEXURE 25:	PAYMENT TERMS- Software Licenses & Implementation	Software Specifications License Cost Implementation Cost 1 Sign off of Functional Requirement Specification by Bank and SI # along with original invoice 1. Original Delivery Challan 15% 2 UAT sign off duly stamped and signed by the Bank Official 30% of license Cost 15% 3 Go live signoff (Acceptance Test should be signed by both Bank's identified Project Manager & Bidder representative.) 40% of license Cost 60% 4 After set up of DC DR and successful completion of at least one DR drill post implementation of	"1. License: For all the users to have active licenses, 100% of the license fee needs to be paid in advance. 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."	No Change in RFP Clause

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				modules as per scope of work 5% of license Cost 10% 5 After completion of warranty period of Application software \$ 10% of license Cost -		
14 1	102	Software Licenses & Implementation	ANNEXURE 25: PAYMENT TERMS	Payment Terms : Licenses	Assuming the Bank is fine with discussion of payment team at the time of bid finalization as OEM has standard licensing payment policy which is follows global GT&C's	No Change in RFP Clause
14 2	102	1. SOFTWARE LICENSES & IMPLEMENTATION	ANNEXURE 25: PAYMENT TERMS	Refer the 'Software Licenses & Implementation' table	License cost should be upfront and not milestone based	No Change in RFP Clause
14 3	102	PAYMENT TERMS	ANNEXURE 25: PAYMENT TERMS	Sign off of Functional Requirement Specification by Bank and SI #along with original invoice1. Original Delivery Challan	Kindly consider issuing 50% of license cost as advance to support vendor to initiate the project successfully.	No Change in RFP clause
14 4	103	2. AMC/ATS OF SOFTWARE	ANNEXURE 25: PAYMENT TERMS	The Warranty period of one year will commence from the date of final GO LIVE sign off of all the module as listed in project scope. AMC/ATS period shall start post warranty period	Warranty period must be for 90 days (3 months) only	No Change in RFP clause
14 5	105	ANNEXURE 26	PROJECT TIMELINE	Stage Activity #Weeks Required for the activity Cumulative e Project duration (weeks) Total Time period for completion of the Project 1 Submission of detailed Project Plan 1 1 Within 1 weeks of acceptance of purchase order to the Bidder 2 Hardware installation/ Configuration, Software development & installation 6 7 Within 7 weeks of acceptance of purchase order to the Bidder 3 Implementation and customization of	Can the implementation modules be prioritized for planning the timelines and given implementation timelines are very short. Therefore we would request to the Bank to provide a minimum 30 weeks of timeline to implement an end-to-end CRM project with all the modules.	Please refer corrigendum for extension provision of 6 weeks under point "a" of the annexure.

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				the solution 6 13 Within 13 weeks of acceptance of purchase order to the Bidder 4 User Acceptance testing & audit closure 3 16 Within 16 weeks of acceptance of purchase order to the Bidder 5 Go live 2 18 Within 18 weeks of acceptance of purchase order to the Bidder		
146	105	Annexure 26	Project timeline		We request the Bank to consider the project time of 18 weeks from the date of sign off of DSRD	No change in RFP Clause. Please refer corrigendum for extension provision of 6 weeks under point "a" of the annexure.
147	105	STAGE 5	ANNEXURE 26: PROJECT TIMELINES	The complete solution should be ready for deployment within 18 weeks from the date of acceptance of the purchase order to the bidder. The timeline of four months / 18 weeks is the maximum time for the proposed project implementation, however, Bidder in their implementation plan shall provide the timeline lesser than stipulated maximum time of 4 months/18 weeks	<ol style="list-style-type: none"> 1. Based on our experience in CRM implementations, timeline of 4 months may pose challenges due to the total scope of this RFP and will require 12 to 15 months to complete the scope. However, any specific modules required by the bank on priority can be completed and implemented in 4 months. 2. If bank agrees for revised timeline, kindly specify the UAT cycles and the duration. 3. We suggest bank to follow MVP (Minimum Viable Product) approach for the implementation. 	Please refer corrigendum for revised timelines

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148	105	PROJECT TIMELINES	ANNEXURE 26: PROJECT TIMELINES	Total Time period for completion of the Project Within 1 weeks of acceptance of purchase order to the Bidder	Require a thorough discussion with the bank team to revisit the complete requirement to understand the actual expectation. It will take 4 weeks time	No Change in RFP Clause
149	105	ANNEXURE 26: PROJECT TIMELINES	ANNEXURE 26: PROJECT TIMELINES	The complete solution should be ready for deployment within 18 weeks from the date of acceptance of the purchase order to the bidder. The timeline of four months / 18 weeks is the maximum time for the proposed project implementation, however, Bidder in their implementation plan shall provide the timeline lesser than stipulated maximum time of 4 months/18 weeks.	Does the bank prefer single phase or multi phase implementation for the defined scope?	Bank Expects phase wise rollout. Details will be shared with successful bidder
150	105	ANNEXURE 26: PROJECT TIMELINES	ANNEXURE 26: PROJECT TIMELINES	The complete solution should be ready for deployment within 18 weeks from the date of acceptance of the purchase order to the bidder. The timeline of four months / 18 weeks is the maximum time for the proposed project implementation, however, Bidder in their implementation plan shall provide the timeline lesser than stipulated maximum time of 4 months/18 weeks.	<p>1. Based on our experience in CRM implementations, timeline of 4 months may pose challenges due to the total scope of this RFP and will require 7 to 8 months to complete the scope. However, any specific modules required by the bank on priority can be completed and implemented in 4 months.</p> <p>2. If bank agrees for revised timeline, kindly specify the UAT cycles and the</p>	Please refer corrigendum for revision in project timeline clause "a"

Sr no	Page #	Point / Section #	Main Section name	Clarification point as stated in tender document	Comments/ Suggestions	Bank's Response
					duration. 3. We suggest bank to follow MVP (Minimum Viable Product) approach for the implementation.	
151	105	ANNEXURE 26: PROJECT TIMELINES	ANNEXURE 26: PROJECT TIMELINES	The complete solution should be ready for deployment within 18 weeks from the date of acceptance of the purchase order to the bidder. The timeline of four months / 18 weeks is the maximum time for the proposed project implementation, however, Bidder in their implementation plan shall provide the timeline lesser than stipulated maximum time of 4 months/18 weeks.	For single phase implementation, does the bank requires any specific modules to be delivered first like: 1. Sales 2. Service Requests 3. Customer 360 etc.	Bank expects phase wise project rollout. Priorities will be discussed with successful bidder.
152	108	A: Architecture requirement: Point 1	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Application should provide web-based n-tier architecture.	Please specify if the expectation is 2 or 3 tier architecture	Expectation is 3 or more Tier
153	108	A: Architecture requirement: Point 14	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL	Application should support a backup and recovery plan to maintain the integrity and availability of the Bank's information asset. Application should support a business continuity plan to maintain or restore operations and ensure availability of the Bank's information asset at the agreed level.	Please clarify that Bank will be providing the DC and DR physical space as per specified hardware to establish the BCP plan. If there would be any port/network restrictions, kindly specify	Yes, Bank will be providing Hardware including space for the same.

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			REQUIREMENT			
154	108	Annexure 28	Compliance to technical / functional requirement	C. Integration Capability	What Middleware the Bank is currently using?	ESB in the Future. CBS API Layer currently
155	108	Annexure 28	Compliance to technical / functional requirement	C. Integration Capability	Request Bank to kindly help us with the list of Systems and channels with which the CRM needs to be integrated	CBS LLMS KYC Hub Digital Lending Platform HRMS Chabot Email SMS
156	109	B: Adminstration Point 16	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	The platform should support hybrid (i.e. PII data on premise and application on cloud) deployments	Since the Bank is proposing the solution to be deployed in on-premise model, please clarify the need for supporting hybrid architecture	The Bank expects solution to be cloud ready for future roadmap of the Bank for cloud adoption.

Sr no	Page #	Point / Section #	Main Section name	Clarification point as stated in tender document	Comments/ Suggestions	Bank's Response
157	109	Section C (1) - Integration capability	Annexure - 28 - COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	1. CRM Application should provide a Graphical User Interface to create interfaces with external system	Kindly elaborate in detail - Does the solution expected to handle all integration interfaces via drag and drop based UI. Please provide some clarity.	Solution is expected to handle integration interfaces via CRM UI, Low code - No code + REST API for Interfaces. But GUI with options such as drag and drop is preferred
158	109	ANNEXURE 28	Technical - Requirements & B Administration Point #15	The platform should support On-cloud (Private) deployments	Today most of the best CRM applications are hosting on cloud. We request bank to allow On-cloud (Public) under Saas mode in addition to Private cloud	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.
159	109	ANNEXURE 28 - COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Technical - Requirements , B. Administration, #16	The platform should support hybrid (i.e. PII data on premise and application on cloud) deployments	Would request you to consider end to end CRM solution deployment on Public Cloud as well along with On premise model.	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.

Sr no	Page #	Point / Section #	Main Section name	Clarification point as stated in tender document	Comments/ Suggestions	Bank's Response
160	109	ANNEXURE 28 - COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Technical - Requirements, B. Administration, #16	The platform should support hybrid (i.e. PII data on premise and application on cloud) deployments	Would request you to consider end to end CRM solution deployment on Public Cloud as well along with On premise model.	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.
161	109	B. 16 ADMINISTRATION	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	The platform should support On-cloud (Private) deployments	As per our understanding, bank is seeking on-premise version. However, bank is asking about on-cloud for the capability purpose. Please clarify since it impacts the TCO.	Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.
162	109	B. 17 ADMINISTRATION	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	The platform should support hybrid (i.e. PII data on premise and application on cloud) deployments	As per Annexure 23 (7) Bank is looking for on premise implementation with capability for a hybrid deployment where one instance of the application is on cloud and other is on premise. Please clarify if the understanding is not correct. Also, will the bank provide the connectivity between on-premise application and cloud instance.	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.

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163	109	B. 17 ADMINISTRATION	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	The platform should support hybrid (i.e. PII data on premise and application on cloud) deployments	<p>Our understanding is that bank wants to deploy the application on premise with hardware managed by the bank/partner. As a future capability, application should capabilities for cloud deployment (dedicated VPC). Based on our experience, all transformation CRM projects in banks are going with the following approach:</p> <ol style="list-style-type: none"> 1. Landing zone - Bank has its own landing zone (VPC) with dedicated account for CRM solution. 2. CRM Architecture - Cloud native architecture with commutable cloud capabilities which can be deployed on-prem or VPC. 3. Application Server & Database hosted on Bank's private cloud landing zone with any Cloud Provider 4. All data will be within Bank's VPC 5. All Industry data protection, security compliances met. <p>CRM Transformation projects requires single tenant architecture from a solution standpoint.</p> <p>This will ensure 100% PII Data Compliance and Data Security Compliance.</p>	Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud. Hardware shall be procured by the Bank.
164	110	C: Integreation Capability: Point 1	ANNEXURE 28: COMPLIANCE TO	CRM Application should provide a Graphical 1 User Interface to create interfaces with external system	INtegration with Bank's systems would be established through REST APIs or other methods like FTP, ETL etc. Can the Bank please clarify on	GUI are user friendly and easy to configure/man

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			TECHNICAL / FUNCTIONAL REQUIREMENT		the need for having GUI to integrated with external systems?	age. Hence the same is expected by the Bank.
165	110	C: Integreation Capability: Point 12	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	CRM system should have an ability to integrate 12 with Core System Integration using a middleware	Please clarify if the BANK will be responsible for getting the middleware	Bidder has to provision the middleware as per commercial bill format
166	110	ANNEXURE 28	Technical - Requirements & C Integration Capability Point # 4	System should provide its own Integration server that would allow integration options using pattern based integration. The Integration server would enable to do complex integration with almost no code changes	Ours is a API first platform which would have an ability to expose and consume any APIs. Still do you want API GW to be proposed as part of the solution	RFP Clause is self-explanatory. Bank is in process of implementation of API GW
167	110	4 / Integration Capability	Technical Requirements - Integration Capability	System should provide its own Integration server that would allow integration options using pattern based integration. The Integration server would enable to do complex integration with almost no code changes	Could you please provide a clarification on this point of what is exactly required here?	Bank expects "No Code - Low Code" like platform
168	111	Section C (17) - Integration capability	Annexure - 28 - COMPLIANCE	CRM will use middleware to integrate with SMS gateway to send SMS to targeted customers when launching a	What is the SMS gateway that is being used currently and the version if any. Please specify	Present SMS gateway is of M/s Karix +

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			E TO TECHNICAL / FUNCTIONAL REQUIREMENT	new campaign or specific events. Sending SMS from CRM i. To selected customers ii. To group of targeted customers iii. To all customers		Airtel. However, bidder may be required to integrate with other ISPS in future without any extra cost to the Bank.
169	111	Section C (20) - Integration capability	Annexure - 28 - COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Ability to integrate with the call center applications (CT/ IVR) such as Avaya, Genesys, Arham, etc.	Is the Bank open for other call center providers apart from the listed ones ? Is there any expectations to integrate multiple service providers ?	Yes, it is expected and additional details will be shared with successful bidder
170	111	Section C (21) - Integration capability	Annexure - 28 - COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Ability to integrate with the Portal to provide access to partners and external stakeholders	Is the portal already available or the portal is also part of the scope ? Who are these partners and Stakeholders as per Bank ?	Portal is not available and the same is expected as part of CRM UI for Sales, External Sales Agents, Marketing Agencies, Customer Service, Leadership, Audit &

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						Compliance, etc.
171	111	Section C (22) - Integration capability	Annexure - 28 - COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Ability to integration with Point of Sale (POS) system	What is the POS system currently in use. Does it support REST API. Is it On prem or on cloud ? What is the usage of this POS in the bank ?	REST API's , ETL will be supported. On-Prem
172	112	E: Security Requirements: Point 15	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Should conduct internal audits regularly as prescribed by industry best practices and guidance?	Can you please highlight the type of audits and the frequency of such audits that would be expected	Audits could be VA / PT (Quarterly), Source Code audit (Annually) any other audit on need bases as per regulatory requirement.

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173	113	E: Security Requirements: Point 28	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Email Integration Capability for Lead Creation with Mailbox	Can you please specify the need for assigning such limit? How many no. of concurrent sessions would the Bank like to enable users to run	RFP Clause is self-explanatory
174	115	F: Database: Point 1	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Solution should support both MY SQL and Oracle Database	If the bidder will be responsible for Software BOM, will only support for MY SQL databases be accepted?	Yes
175	118	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Technical - Requirements, H. Logging, Monitoring and Reporting, #9	The provided solution should support session recording solution for any type of connections(technical & functional administration, Vendor to provide compatibility list)	Would request you to shed a bit more details on this ask	Tools for monitoring and tracking of users for administrative purposes

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176	121	4 / Lead Campaign Management	Functional Requirements - Lead Campaign Management	Ability to perform Omni Channel Lead management	What are all the channels required here for Omnichannel lead management?	Some of the important channels are IB MB Tablet WhatsApp SMS/POS/UPI
177	121	A.11 LEAD CAMPAIGN MANAGEMENT	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Ability to attach documents by CRM user's for any lead.	Does Bank already have an existing document management system in place with which the proposed CRM solution can integrate with?. Please Clarify	Yes. A DMS solution is available in the bank
178	121	Annexure 28	COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Ability of auto-closure of Leads by integrating with different subsystems like CBS, BPM (Workflow Software), Third Party Applications in real time and batch mode of integration	What are the different Transactional System integrations required for lead creation	Will be discussed with the successful bidder
179	122	Section A (18) - Lead Campaign Management	Annexure - 28 - COMPLIANCE TO	Email Integration Capability for Lead Creation with Mailbox	Can you please mention which email provider is currently used by the Bank ?	Solution is expected to support the feature

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			TECHNICAL / FUNCTIONAL REQUIREMENT			irrespective of the email platform. Presently, Bank is using on-prem email solution
180	122	14 / Lead Campaign Management	Functional Requirements - Lead Campaign Management	"Ability of auto-closure of Leads by integrating with different subsystems like CBS, BPM (Workflow Software), Third Party Applications in real time and batch mode of integration"	What are all the third party integrations to be considered here?	some of the important third party integration expected are CBS LLMS KYC Hub DLP HRMS Chabot Email SMS
181	122	A.18 LEAD CAMPAIGN MANAGEMENT	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Email Integration Capability for Lead Creation with Mailbox Lead Integration capability with SMS Gateway	For email/SMS integration, the proposed CRM solution can integrate with the Email and SMS gateways to send/receive emails and SMS. The APIs for the same need to be provided by the bank. Please Clarify	Noted

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182	122	A.23 LEAD CAMPAIGN MANAGEMENT	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Ability to do text mining and NLP processing for processing leads getting created through Email channels	Does Bank already have an analytical tool in place with which the proposed CRM solution can integrate with? Please Clarify	No Solution currently
183	122	A. 18.	Functional Requirements	Email Integration Capability for Lead Creation with Mailbox	For email/SMS integration, the proposed CRM solution can integrate with the Email and SMS gateways to send/receive emails and SMS. The APIs for the same need to be provided by the bankPlease Clarify	Bidders understanding is correct
184	122	Annexure 28	Lead Management	Ability to set lead ownership based on product basis , or in Round Robin pattern if multiple users are available in a team with option to configure the logic in application by Sales Team	The personas involved currently in the lead creation process	Will be discussed and finalized with the successful Bidder
185	123	1 / Marketing & Campaign Management	Functional Requirements - Marketing & Campaign Management	Ability to specify and launch campaigns through various channels (e.g. email, SMS, Social Media etc)	What are the social media channels to be considered here for campaign execution?	Email, SMS, Social Media, Google, In App and Browser Notifications, WhatsApp

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186	127	C.35 SALES PROCESS MANAGEMENT	ANNEXURE 28: COMPLIANCE TO TECHNICAL / FUNCTIONAL REQUIREMENT	Ability to retrieve a product's actual sale volume from the 'Actual Revenue' figure of that product's Opportunity	Requesting bank to please clarify this requirement with an use case.	Ability to track Planned v/s actuals for targets to Sales Teams for different Banking products
187	139	6 / Customer 360° View	Functional Requirements - Customer 360° View	Customer household relationship grouping	We request to support this requirement by a use case here?	Family Grouping
188		GEM Bidding Document		Bidder has to upload scanned copy / proof of the DD along with bid and has to ensure delivery of hardcopy to the Buyer within 5 days of Bid End date / Bid Opening date.	As per RFP document, the EMD and other receipts has be uploaded online in GEM while bid submission. Is it mandate to send the hardcopy of EMD receipts to Bank?	Yes, after uploading scan copy, It is mandatory to send hardcopy / original documents like DD, PBG, NDA / IP executed on Stamp Paper to the Bank.
189				Request Bank team to share total number of CRM Users & growth for next 5 years in number of users.	Request Bank team to provide break up of how many users are going to use CRM system. What are their roles in the organisation and whether they are internal employees or external staff. A breakup of the same	Bank's requirement is self-explanatory i.e. solution with enterprise

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					would be helpful. Also what would be year on year increase in the number of users for all these personas?	license without restriction on the number of users. Bidder for its sizing purpose may factor appropriate number of users based on its experience. However, Bank will not pay any extra cost in case of increase in the user count
190				Request Bank team to share Volumetrics for various use cases envisaged in end to end CRM Implementation. This would be needed for sizing and estimation purpose.	Request Bank team to provide yearly volumes for all type of use cases:- No. of Leads created annually. No. of Cases created annually. No. of Integration touchpoints. No. of APIs to be integrated (Inbound and Outbound APIs both). No. of DSA/Partners/Third Party Agents that will require access to Salesforce. Also request bank team to provide 5 year projections for the volumes as	Will be shared with the successful bidder

Sr no	Page #	Point / Section #	Main Section name	Clarification point as stated in tender document	Comments/ Suggestions	Bank's Response
					we would need that from estimation and sizing purpose of the application.	
19 1				Volumetrics for marketing campaign management	Channels of Communication needed; Emails, SMS, Whatsapp, Push Notifications Total contact database No. of Emails are needed annually No. of SMS is needed annually No. of Whatsapp Messages are needed annually No. of Mobile Push Notification is needed annually	Will be shared with successful bidder
19 2				Data to be migrated to Salesforce	Request Bank team to share the volume of data that needs to be migrated to Salesforce from current CRM system. Would need number of customers and size of the data (in GBs) to understand and plan migration strategy.	Around one year of existing Call Center Data
19 3				Earnest Money Deposit	We would request the Bank to provide a waiver on this EMD amount or reduce it to minimum deposit	EMD Exception shall be applicable as per General Terms and Conditions on GeM 4.0 (Version 1.12) dt 16th August 2023. It is

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						bidder's responsibility to comply with GeM terms and conditions and provide appropriate documents to avail such exception, wherever required.
194				Integration	Integration with third party tool will be required translation. The cost of the Tool/ APIs/ Connector will be borne by the Bank	Bidder is expected to factor the expenses in Bid
195				Integration	Request to the Bank to provide List of Integration list	Will be shared with the successful bidder
196				Integration	Does the Bank has any middleware or ESB tool for integrations?. Request you to please share the details	ESB is planned in future

Annexure – 2: responses to General queries

Sr. No.	General Query related to RFP	Comment / Suggestions	Bank's Response
1	<p>The marking for the requirements/compliance is based on the below criteria A – Readily Available C-Customizable without any additional cost to the Bank NA – Not Available and Not Customizable</p> <p>However, many of the readily available requirements will be done or managed via integration. How will the bank score for such requirements. Please clarify.</p>		Bidder is expected to respond basis capability of the solution with required documentation
2	<p>In accordance with the RFP, the requested offerings include:</p> <ol style="list-style-type: none"> 1. CRM 2. ChatBot 3. Contract Management 4. Artificial Intelligence - NLP/ML 5. Enterprise Knowledgebase 6. Enterprise DMS 7. Enterprise Data Strategy Solution (Data Flows, ETL) 8. Archiving Tools <p>Please verify whether the bank is seeking only a CRM solution or if additional offerings are also being considered.</p>		CRM
3	Does bank has any EULA with database provider?		Enterprise Unrestricted License Agreement - Yes

Sr. No.	General Query related to RFP	Comment / Suggestions	Bank's Response
4	<p>We understand and assume that CRM application solution activities and implementation services (Requirement gathering, development, testing support (SIT/UAT), go live) are provided by us and the remaining activities mentioned below are taken up by Customer's IT team or third party vendor's team. Please confirm if Customer's IT team or third party vendor's team can perform the following:</p> <p>A. Infrastructure Supply, Support and Maintenance B. Security Maintenance C. Deployment D. Disaster Recovery and Business continuity E. Testing: a. Application Security (VAPT) b. Performance Test c. Load/ Stress d. SIT e. UAT F. Customer's side integration a. Data Migration activity b. ETL activities c. Integration jobs (Any data, which has to be fetched from legacy system to staging) d. API/ webservices (Any API, which need to be custom developed to integrate with core system) G. Training and Roll out activities</p>		<p>Hardware and infrastructure will be provided by the bank. Everything else will be the responsibility of the Vendor</p>
5	<p>Will the bank provide the behavioural data and interaction data?</p>		<p>Not being captured currently</p>
6	<p>What will be the projected year wise concurrency</p>		<p>Will be shared with the successful bidder</p>
7	<p>Would the bank be inetersted in managing it's own Hardware and Infrasturcture or would it preffer to go with a SaaS solution that takes care of Infrasture Security as well as Extensibility, Scalability and Infrastructure Optimizations automatically using best in class AI to support any amount of load that the Bank can expect to experience any time of the Year? We ask because our SaaS solutions come with a streong confidence of a Financially Backed</p>		<p>As per the RFP</p>

Sr. No.	General Query related to RFP	Comment / Suggestions	Bank's Response
	SLA to manage all these Infrastructural aspects leaving the Bank team to focus on Growing Business and envisioning and delivering Business Functions.		
8	How does the bank plan to provide remote access to its CRM solution for employees working from home or on the go?		Based on existing practices at the Bank for all critical applications
9	How important is it for the bank to be able to quickly adapt to changing business needs? Would the Bank prioritize Low code capabilities over Pro Code based applications?		Low Code - No Code
10	How does the bank plan to integrate its CRM solution with other systems and data sources? Would the bank see more value in readymade connectors over bespoke integrations?		Low Code - No Code
11	How does the bank plan to ensure the interoperability of its CRM solution with other systems and data sources?		Will be shared with the successful bidder
12	What parameters would the bank evaluate the extensibility of its New CRM solution to support new business requirements and use cases?		Will be shared with the successful bidder
13	What are the Top Business Matrix that the Bank would like to improve with the New CRM for the Bank Over All?		Will be shared with the successful bidder
14	What are the Top Business Matrix that the Bank would like to improve with the New CRM for the each Line of Business?		Will be shared with the successful bidder
15	Can you please share the user profiles across each business functions and respective No of users who would require access of the CRM?		Will be shared with the successful bidder
16	How important is the ability to seamlessly manage the maintenance and upgrades of CRM solution? Would the bank prefer an evergreen solution that keeps upgrading itself behind the scene requiring the bank to only switch on the new features with minimum configurations?		Yes
17	Is it okay if the bidder has international banks as customer?		Information already available in tender document

Sr. No.	General Query related to RFP	Comment / Suggestions	Bank's Response
18	Will NBFC customers also be considered as relevant for references?		Information already available in tender document
19	Is minimum 1000 branches in each organisation mandate?		Information already available in tender document
20	What messaging tools is CRM integrated with ? Teams/ WhatsApp/ SMS/ Email?		All
21	What is the process followed for Change Request and what is expectation from the resources onboarded for Implementation? How do you breakup tasks between support and development?		As per Bank's existing practice
22	Will you require data archival policy for transactional data or master data , Data can be archived in some other database after the period defined ,report can be send to admin user to view.		As per Bank's existing practices
23	What are the core financial applications exists today to which CRM is integrated to?		CBS LLMS KYC Hub DLP HRMS Chabot Email SMS
24	Will you have any Document Storage location (Sharepoint/Azure/External location)to store the documents or it will be in crm database itself.		Bank is using a DMS solution currently.
25	Do you have any on-premise DWH to connect to? Do you provide VPN connections to connect to any environments?		DWH - No VPN - provide as per Bank's policy
26	What kind of social media integration ? Do you have any ORM tool in place?		Email, SMS, Social Media, WhatsApp ORM doesn't exist as of now
27	Do you have any existing CTI vendor?		Internally built

Sr. No.	General Query related to RFP	Comment / Suggestions	Bank's Response
28	Data Migration Scope - Please specify the list of entities and approximate number of records to be migrated. Also specify from which all systems data to be migrated and of what duration.		Migration from existing CBS and Call Center Solution
29	Are there migration SSIS routines present or custom schedulers are built to import?		Not present
30	Please specify List of custom reports required, do you have any tool for reports or reports need to build and publish in CRM itself.		Reports will be in CRM. Bank will support with any Bank integration
31	Are these pre-decided? Can this change according to the scope and BRDs? Does BRD existing today?		Scope of work will be provided by the Bank. Everything else will be the responsibility of the Vendor under guidance and supervision of the Bank
32	Decision on Multi-tenant environment vs single tenant for Global deployment to be considered.		Single Tenant
33	Email Integration with Exchange Online or SMTP/ POP?		SMTP or API
34	Are you using a CRM system currently		Solution under testing with very basic CRM capabilities
35	Are you using DevOps for CI/ CD?		Will be implemented in near future
36	No. of Resources required to manage the current implementation and breakup of skill set vs count?		Will be implemented in near future
37	Do you use Power BI for reporting? Are there multiple data sources that you connect to?		Will be implemented in near future
38	Per Month volume of leads & cases		Will be shared with the successful bidder
39	Per Month volume of phone calls, Emails		Will be shared with the successful bidder
40	Total number of CRM users per function		Will be shared with the successful bidder

Sr. No.	General Query related to RFP	Comment / Suggestions	Bank's Response
41	How do you execute quality certifications before any build is promoted to Production?		Will be shared with the successful bidder
42	Any archival strategy used? How much is Production DB size today?		Will be shared with the successful bidder
43	Do you do code reviews/ execute solution checkers to ensure quality is intact?		Yes
44	Request Bank team to share total number of CRM Users & growth for next 5 years in number of users.	Request Bank team to provide break up of how many users are going to use CRM system. What are their roles in the organisation and whether they are internal employees or external staff. A breakup of the same would be helpful. Also what would be year on year increase in the number of users for all these personas?	Bank's requirement is self-explanatory i.e. solution with enterprise license without restriction on the number of users. Bidder for its sizing purpose may factor appropriate number of users based on its experience. However, Bank will not pay any extra cost in case of increase in the user count

Sr. No.	General Query related to RFP	Comment / Suggestions	Bank's Response
45	Request Bank team to share Volumetrics for various use cases envisaged in end to end CRM Implementation. This would be needed for sizing and estimation purpose.	<p>Request Bank team to provide yearly volumes for all type of use cases:-</p> <p>No. of Leads created annually. No. of Cases created annually. No. of Integration touchpoints. No. of APIs to be integrated (Inbound and Outbound APIs both). No. of DSA/Partners/Third Party Agents that will require access to Salesforce.</p> <p>Also request bank team to provide 5 year projections for the volumes as we would need that from estimation and sizing purpose of the application.</p>	Will be shared with the successful bidder
46	Volumetrics for marketing campaign management	<p>Channels of Communication needed; Emails, SMS, Whatsapp, Push Notifications Total contact database No. of Emails are needed annually No. of SMS is needed annually No. of Whatsapp Messages are needed annually No. of Mobile Push Notification is needed annually</p>	Will be shared with the successful bidder

Sr. No.	General Query related to RFP	Comment / Suggestions	Bank's Response
47	Data to be migrated to Salesforce	Request Bank team to share the volume of data that needs to be migrated to Salesforce from current CRM system. Would need number of customers and size of the data (in GBs) to understand and plan migration strategy.	
48	What is the deployment model?		Bank expects Cloud ready platform deployed On-Prem with future capability to Migrate to the Cloud.
49	What are the total no. of user?		Bank's requirement is self-explanatory i.e. solution with enterprise license without restriction on the number of users. Bidder for its sizing purpose may factor appropriate number of users based on its experience. However, Bank will not pay any extra cost in case of increase in the user count
50	Concurrency?		Will be discussed with successful bidder
51	Existing CRM System, if any?	Is there an existing CRM solution that you are looking to replace or would this be a	Green-Field

Sr. No.	General Query related to RFP	Comment / Suggestions	Bank's Response
		new CRM implementation (Green-field vs brown field)?	
52	Inviting Bid from SIs	We will be participating in the bid as the OEM as well as the SI. Hope the same will be acceptable to the Bank	Noted
53	Request for Extension	We would request the Bank to consider a three week extension to submit the bids. This is because of limited resources available on account of the upcoming holiday season	Please refer corrigendum
54	Data Volume	Please provide data volume of leads, customers and tickets. Also please specify the incremental volume of these per month or year	Will be shared with successful bidder
55	API Readiness	Request the bank to confirm that all the systems that would need to be integrated with Zoho's solutions support REST APIs for integration. If not, please specify the alternate approaches or expectations if any from the bank.	Yes

Corrigendum 2

Following terms stands revised:

Sn	Existing Term	Revised Term
1	<p>2. INVITATION FOR TENDER OFFERS</p> <p>I. Last Date and Time for receipts of tender offers 19/01/2024 up to 17:00 hours</p> <p>II. Time and Date of Opening of technical bids 19/01/2024 at 17:30 hours</p> <p>III. Earnest Money Deposit 40 Lakhs</p>	<p>2. INVITATION FOR TENDER OFFERS</p> <p>I. Last Date and Time for receipts of tender offers 19/01/2024 up to 17:00 hours (as per corrigendum 1)</p> <p>II. Time and Date of Opening of technical bids 19/01/2024 at 17:30 hours (as per corrigendum 1)</p> <p>III. Earnest Money Deposit 20 Lakhs</p>
2	<p>6.52. Escrow Arrangement:</p> <p>The Bank and the successful bidder shall agree to appoint an escrow agent to provide escrow mechanism for the deposit of the source code for the CRM Solution supplied/ procured by the successful bidder to the Bank in order to protect its interests in an eventual situation. The Bank and the successful bidder shall enter into a tripartite escrow agreement with the designated escrow agent, which will set out, inter alia, the events of the release of the source code and the obligations of the escrow agent. Costs for the Escrow will be borne by the successful bidder. As a part of the escrow arrangement, the final successful bidder is also expected to provide a detailed code documentation of the Audit software solution which has been duly reviewed by an external independent organization/ consultant of the bank. The successful bidder shall maintain the Software libraries and ensure all future upgrades and Customizations are effected in the escrow copy maintained as a part of the escrow arrangement till the Contract Period. The Bidder shall cause the owner of Source Code to deposit fully documented Source Code for the Software provided under the Deliverables (including in any stage of completeness, repair, or Acceptance Testing) in escrow. Under such escrow agreement, the escrow agent shall be required to verify each such deposit by the owner of Source Code. The successful bidder shall verify or cause the owner of Source Code to</p>	<p>6.52. Escrow Arrangement:</p> <p>The Bank and the successful bidder shall agree to appoint an escrow agent to provide escrow mechanism for the deposit of the source code for the CRM Solution supplied/ procured by the successful bidder to the Bank in order to protect its interests in an eventual situation. The Bank and the successful bidder shall enter into a tripartite escrow agreement with the designated escrow agent, which will set out, inter alia, the events of the release of the source code and the obligations of the escrow agent. Costs for the Escrow will be borne by the successful bidder and Bank in equal proportion. As a part of the escrow arrangement, the final successful bidder is also expected to provide a detailed code documentation of the CRM solution which has been duly reviewed by an external independent organization/ consultant of the bank. The successful bidder shall maintain the Software libraries and ensure all future upgrades and Customizations are effected in the escrow copy maintained as a part of the escrow arrangement till the Contract Period. The Bidder shall cause the owner of Source Code to deposit fully documented Source Code for the Software provided under the Deliverables (including in any stage of completeness, repair, or Acceptance Testing) in escrow. Under such escrow agreement, the escrow agent shall be required to verify each such deposit by the owner of Source Code. The successful bidder shall verify or cause the owner of Source Code to periodically (a) verify that all such deposits are current and complete and (b) promptly provide the Bank with written certifications of such currency and completeness.</p>

Sn	Existing Term	Revised Term
	<p>periodically (a) verify that all such deposits are current and complete and (b) promptly provide the Bank with written certifications of such currency and completeness.</p> <p>The Escrow arrangement suggested by the successful bidder shall not be binding on the Bank.</p> <p>The Bank reserves the right to explore alternate escrow mechanisms based on the Bank's existing practices. The Bank and the successful bidder may enter into such escrow arrangement that is mutually agreed upon by the two parties.</p> <p>The escrow will be released and become the property of the Bank in the event that the agreement is terminated for either default or insolvency or should the successful bidder cease, or give notice of intention to cease providing maintenance or technical support service for the software as required by the agreement.</p>	<p>The Escrow arrangement suggested by the successful bidder shall not be binding on the Bank.</p> <p>The Bank reserves the right to explore alternate escrow mechanisms based on the Bank's existing practices. The Bank and the successful bidder may enter into such escrow arrangement that is mutually agreed upon by the two parties.</p> <p>The escrow will be released and become the property of the Bank in the event that the agreement is terminated for either default or insolvency or should the successful bidder cease, or give notice of intention to cease providing maintenance or technical support service for the software as required by the agreement.</p>
3	<p>ANNEXURE 26: PROJECT TIMELINES</p> <p>a. If however, the delay is caused by any action pending from the Bank end, the corresponding\ period will not be considered while calculation of delay period.</p>	<p>ANNEXURE 26: PROJECT TIMELINES</p> <p>b. If however, the delay is caused by any action pending from the Bank end, the corresponding\ period will not be considered while calculation of delay period. Further, Bank may consider realignment of timelines up to 6 weeks subject to request from an successful bidder with proper justification.</p>

Sn	Existing Term	Revised Term
	<p>ANNEXURE 22- TECHNICAL EVALUATION CRITERIA</p> <p>1 Product Expertise and Experience</p> <ul style="list-style-type: none"> • Number of relevant credentials of development/implementation of CRM solution <p>For each live solution in more than 1 Schedule Commercial Bank in India, includes customer References and feedback (Based on Site Visit) (5 Marks for each implementation subjected to Max 20 Marks)</p> <ul style="list-style-type: none"> • Level of Expertise and skill set for the Dedicated Team assigned this Project <p>Bidder Company's capability/strength and Ability & experience of the proposed Engagement Team handling proposed Project</p> <p>15 Marks – if the Proposed Project team has implemented in more than 3 PSU/Private Sector. 10 Marks – if the Proposed Project team has implemented in more than 2 PSU/Private Sector. 5 Marks – if the Proposed Project team has implemented in more than 1 PSU/Private Sector.</p>	<p>ANNEXURE 22- TECHNICAL EVALUATION CRITERIA</p> <p>1 Product Expertise and Experience</p> <ul style="list-style-type: none"> • Number of relevant credentials of development/implementation of CRM solution <p>For each live solution in more than 1 BFSI organization in India with more than 1000 branches, includes customer References and feedback (Based on Site Visit) (5 Marks for each implementation subjected to Max 20 Marks)</p> <ul style="list-style-type: none"> • Level of Expertise and skill set for the Dedicated Team assigned this Project <p>Bidder Company's capability/strength and Ability & experience of the proposed Engagement Team handling proposed project</p> <p>20 Marks – if the Proposed Project team has implemented in more than 4 PSU/Private Sector. 15 Marks – if the Proposed Project team has implemented in more than 3 PSU/Private Sector. 10 Marks – if the Proposed Project team has implemented in more than 2 PSU/Private Sector. 5 Marks – if the Proposed Project team has implemented in more than 1 PSU/Private Sector.</p>
	<p>ANNEXURE 24: ELIGIBILITY EVALUATION</p> <p>11. The bidder should have experience of implementing CRM Solution to at least two Public Sector Banks/Private Sector Banks in India with Minimum 1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP.</p>	<p>ANNEXURE 24: ELIGIBILITY EVALUATION</p> <p>11. The bidder should have experience of implementing CRM Solution to at least one Scheduled Commercial Bank in India with Minimum 1000 branches in each organisations in last 5 years from the date of RFP. The Solution should remain live as on date of RFP</p>