Annexure - 10.12 FUNCTIONAL & TECHNICAL REQUIREMENTS

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
a] Inbound Calls				

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
a.	**General and account related queries on products & services of the Bank & third-party products**	An indicative list of products on which general or account related queries are expected to be received are: o Deposits & Advances o Demat accounts o Loyalty & Rewards program o RTGS/NEFT o Debit Cards o NPS o Any other new products		
		The Agents are expected to be knowledgeable with the bank's product information like o Interest rates o Gold rates/Forex rates o Loan Turn Around Times (TATs) This information is expected to be available to the agent in their system.		
		Types of account related queries expected to be received include : o Balance o/s [Principle Amount, Interest Amount] o Maturity amount of FD, maturity date of FD, Interest Rate, Tax Deducted, Tax Projection o Status of cheques [credited or debited or stop payment instructions] o Loan o/s [Principle Amount, Interest Amount, Charges] o payments due o interest debited, etc.		
		Enquiries can also be expected on last transactions information.		
		On receipt of any call (numbers registered in the database) the last 5 call histories should be displayed to call agent with status there off.		
		On missed call to a designated toll number, balance status of all linked operative accounts (Savings, Current, CC) may be sent automatically through SMS to the registered mobile number. There is no current need to record this interaction within CRM.		

b.	**Enquiry on basic banking services and transactions**	An indicative list of enquiries is given below: o Money / Transfer Fund, NEFT, RTGS [Status of transfer] o Queries regarding term deposits o Purchase of third party products o Utility Bill Payments, tax payments o T-Pin related transactions o Query and view a list of remittances made o Presentment Billers with whom the bank has tied up o Pending and rejected payments [Status of payment made] o Rejected Bills [future schedule for bill payment]		
c.	**Complaints and Service Requests**	The types of service requests expected to be received include: o Cheque book issue & stop payment of cheques o Account statement and passbook of any accounts o demand drafts/remittances o Standing Instructions o SMS OTP / Alert not delivered o Internet Banking/ Mobile banking / RTGS / NEFT		
		Queries on earlier service requests/complaints would also need to be handled		
		All Enquiry / Services /complaints / feedback / suggestions from customers and non-customers would need to be recorded in vendor's CRM Software		
		All web site based complaints accepted at bank's official web site should be integrate with CRM so that redressal will be done by Call centre/ branch/zonal office/head office		
		Complaints / enquiries are to be forward to branches if not resolved at call centre location		
		CRM should have capability to auto escalate the complaint/query in case not redressed timely		

d.	**Queries on Internet ,Mobile Banking, SMS & Tele Banking**	The types of queries related to Basic Banking with Internet & Mobile Banking include:
		o account opening status
		o account lockout problems
		o funds transfer/reversal issues
		o issuance and reset of user ID and password
		o Mode of Delivery and sent status along with date & time of
		  user ID and password
		o Account Limit increase & Decrease request
		o Account Beneficiary Addition / Deletion request.
		  [Status of Beneficiary]
		o Online FD, duplicate challan issues		

		Customers might also need to be handheld and guided through the entire processes of internet and mobile banking		

e.	**ATM specific queries and c**	Indicative list of ATM related queries and complaints include:
		o Non-disbursal of cash
		o Card hot-listing and complaints related to wrongful
		   transactions/ Card lost(both debit and credit cards)
		o Call logging for down ATMs with concerned vendor
		o ATM PIN block related queries
		o ATM Card Not Received or ATM Card Received but ATM Pin not
		   Received
		o ATM Card Received but not working or ATM pin received but
		   not working
		o ATM room Not clean /ATM not functional/ATM room not
		   guarded by security
		o Status of delivery of card or pin of primary / secondary
		o ATM Cash Shortage/Excess
		o The Call Centre should be able to provide the location of
		   ATM/Branch from the data of ATMs and Branches		

f.	**NRI accounts**	All above listed functions and services would also need to be provided for NRI accounts. There would be a separate toll number for NRI customers. There has to be ability to receive call originated outside the country in addition to domestic calls.		
g.	**Call Recording**	Ability to digitally record all incoming calls capturing atleast the following details: o Date and time of call - start and end time o Agent Id o Caller number o Customer ID, Account number, Card Number Recording system should have ability to provide search on the above data as well		

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
a.	**Marketing Functions & Campaign management**	The Bank may conduct several sales campaigns for promotion of new / existing products from time to time. The Bank also runs marketing campaigns for enhancing brand equity and product awareness among target audience. The Call Centre will be required to assist the Bank in its endeavors by making outbound calls to customers and non-customers, to execute the following indicative list of functions: o Cross-selling & up-selling of Bank's products to customers o Popularizing sales promotional offers such as special interest rates, waiver of charges, free bees, etc. to customers o Popularizing Bank's products to new customer		
		Other Campaign related facility to be made available in the vendor's CRM system includes: o It should have ability to import data for marketing campaigns from any other source systems, through excel or CSV files provided by the bank o It can manage more than one campaign and can assign specific agents for specific marketing at the same time. The system should be able to change the assignment of the agents to the different marketing campaigns o Agents/ users should be able to view the campaign details on a pane designated for campaigns on the screen o System can show the performance of each agent against each campaign o System can define pacing ratio's based upon number of records and status of preceding calls		
		During the above process, any leads arising out of dialogue with customers and non-customers would need to be recorded in CRM. CRM System should allows systematic capturing of leads through various Alternate Delivery Channels (ADCs) which are then allotted to 'Lead Owners' at branches or Circle Offices. The 'Lead Owners' may request the Call Centre to perform the following functions: o Preliminary lead validation – verification of number, name, purpose, etc o Fixing of appointment o Assistance in lead escalation and follow up		
b.	**Soft Recovery**	The Bank require to use the Call Centre for soft recovery of its overdue loans, in which case, the Call Centre will be required to execute the functions, given below. The Details of borrower accounts are to be displayed in CRM. o Make soft reminder calls to customers on the overdue loans o Make follow-up calls to customers and coordinate with recovery agents (if any)		

c.	Others	The Bank may also utilize the services of Call Centre for the following purposes:
		    o Market survey on "Customer Satisfaction" on services provided by Bank
		    o Calling Bank's branches/offices to convey information about new initiatives. Whenever any such information done at
		      HO, to train / to sensitise the staff
		    o Making welcome calls to new customers
		    o Any calls related to security checks (SOC calls)		

		If customer has been unable to speak to the agents after waiting in the queue for a long time, such customers should be reached out to, within a desired time interval, by the outbound agents		
		Vendor should do the Extraction of Information from TRAI website related to Do Not Dial numbers and update the central CRM database on specific frequency. Before making any marketing outbound calls, system should verify the number against the DND database.		
		Bank's Branches should be given access to CRM module where data of prospective or live customer will be updated after outbound making calls from the contact center .		
		There may be certain calls which can not resolved immediatly, the call agent should seek permission from the customer for outbound call and the time window so that Outbound call can be initiated to resolve the isssue proactively.		

		Ability to digitally record all outbound calls capturing atleast the following details:
		  o Date and time of call - start and end time
		  o Agent Id
		  o Caller number
		  o Customer ID, Account number, Card Number
		Recording system should have ability to provide search on the above data as well		

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
a.	Emails and Website	Agents should be able to access the emails that the customers have sent from their internet banking account, create a record in CRM and process the same		
		Complaints received through website should be captured in the CRM database and Agents should be able to access and process the same in the CRM system		
		Agents should be able to access the emails directly sent to the contact centre, create a record in CRM and process the same		
b.	webchat	Agents should be able to perform webchat with customers who have requested a chat interaction through the website. The interaction log has be recorded against the customer once the chat is over		
c.	Video Conferencing	Webcam based Video Conferencing may be taken up, in future, as a channel in the Contact Centre to interact with Bank's customers. There should be provision to add the video conferencing functionality in future as per banks requirement. However, it is not in the current scope of services to be provided.		

c] IVR and ACD

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
a.	IVR Structure	The Vendor selected to run the Call Centre will be required to design the IVR tree structure in consultation and with the approval of the Bank. The Bank may suggest changes and customization in IVR tree structure from time to time, which the Vendors will be required to execute.		
		The Vendor should be able to configure important messages/advertisements on IVR free of cost during the waiting period of caller. The content and time period for such messages/advertisements shall be decided by the Bank.		
		If there is any change in IVR voice menu option then bank will provide only English tree structure content [in text format]. It is vendor's responsibility to convert it in to audio format and also into audio format of specified language other than English.		
b.	IVR - Functionality Related Requirement	IVR should provide music or Key announcements when customers are kept on hold or during call waiting		

	IVR system must have ability to integrate Bank's CBS for fetching the below requirements on real time basis. Below are the indicative lists of IVR options. The addition/modification in below options will be decided by the Bank during implementation phase.
	
	(A) General Information
	o Balance Enquiry
	    1. Saving Account
	    2. Current Account
	    3. CC Account
	    4. Term Loan Account
	    5. Time Deposit Account
	o Account Statement Request
	    1. Receive Statement by Fax / E-mail
	    2. Receive Statement by Courier
	o Listing of Last 5 Transactions
	o Cheque related queries
	    1. Current Status of Cheque
	    2. New Cheque book request
	    3. Stop payment request for single/multiple Cheque
	    4. Revoke stop payment request for single/multiple Cheque
	o Payment request and Fund Transfer
	o General Information on Products
	    1. Domestic Deposit Products
	    2. NRI Deposit Products
	    3. Loan Products
	
	(B) Hot-listing of Lost Card [Credit/Debit]
	
	(C) Change of TPIN number
	    1. Generation / reset of T-PIN by validating himself through ATM Card No		

		IVR should support the following languages - English, Hindi and Marathi, Punjabi, Tamil, Telugu & Kannada - in the current scope. There should be a provision to add more languages in the future.		
		Ability to capture all the customer's interactions with the IVR and pass it to the Contact Center (i.e. CTI Integration)		
		Ability to offer different IVR trees based upon different customer segments (region, segment etc)		
		By referring the profitability of customer from bank's various systems priority based service is to be provided through IVRS & CTI		
		Ability to announce reference number for transaction or service request.		
		Ability to add multiple marketing message on the IVR system and to schedule different marketing messages in specific dates and for a specific period. Ability to voice out marketing messages based upon customer type		
		Ability to integrate to T-PIN server to offer online T-PIN generation after certain validations such as date of birth and card expiry date		
		Ability of IVR to hotlist the card directly with integration of switch after validating the customer information such as date of birth, card expiry date and account number.		
		Premium Customers Line: Option for premium customers to request for a call back by agents in case the waiting time exceeds 20 seconds (to be parameterized), such that in case a premium customer wishes to stop waiting and registers for the said option, an announcement will be played to customer that an agent will call him back shortly. Thereafter, an agent will make an outbound call to the customer. The maximum call back time will be as defined by the Bank from time to time		
		Ability to route the caller to the ACD when the customer requires to talk to an agent		
		Ability to support "call back" option in the event of long call waiting		
		Ability to change the IVR Tree by the system user, with no change in the software, through GUI Interface		
		Customer should have the ability to punch the account number in case of having multiple accounts linked so as to extract required information automatically		
		Ability of a return IVR call to be made to minimum 50% customers just after call is complete for knowing the feedback to access the satisfaction level of the customer about the knowledge of the agent about the banking products and over all satisfaction level about the call.Feedback has to be recorded within CRM system		
		Ability to support audio-text for playback of regulations, procedures and frequently asked questions as per the IVR Call Flow & Call Tree		
		Ability of administrators to monitor where an identified customer is on the IVR tree, it can be used to identify the customers and making the outbound call so as to understand their difficulties / problem in using the IVR system		

		Updation in IVR menu : - The development time and cost of modification or Updation of IVRS menu options is directly dependent upon the task to be performed. The task can be categorized into two segments:
		    o Minor Changes [E.G. Updation in IVR menu tree option such
		       as title change or number or sequence change for an existing
		       option.]. This should be performed with no cost to the bank
		    o Major Change- these changes can be transaction related or
		       any operation through IVRS [E.G. installation of New menu
		       option in IVRS which needs integration of IVRS+CRM+CBS]		

c.	ACD - Functionalities	Ability to configure ACD
		  o by agent
		  o by skill
		  o by group
		  o by priority
		  o by call type		

		Enhanced conditional routing. One feature could be "Ring One" according to at least one of the following configuration:
		    o With 'Least Recent' - the extension that received a call the longest time ago will be on the top of the list
		    o With 'Fewest Calls' - the extension that received the least number of calls will be on the top of the list
		    o Random selection		

		Call back on queing basis in the event of all agents are busy.		
		Adjustable queing limits		
		Voice Response Integration		

		Call routing to be done based on the following:
		    o Day of week
		    o Time of day
		    o Customer profiles
		    o Agent Skill based routing
		    o Region of the incoming call
		    o Nature of the call (Trading related calls,Demat Related Cards, Hot Listing Related calls - Such calls are to be attended on priority)
		    o Language selected by the customer in IVR
		    oQueue Statistics		

		Support routing for Web-Callback (initiated from the Website)		
		Support routing for emails received on the Contact Center email account		

		Calls from the segments mentioned below would need to be attended by more experienced, multi- skilled and suitably trained agents:
		    o Corporate/SME customers
		    o Premium Customers [based on top 100 criteria or other decided
		      by bank]
		    o Calls received from branches
		    o Any other segment which the Bank decides to add in future		

		System should have ability to announce call queue waiting time for all customers. Call queue waiting time is the waiting time in Automatic Call Distributor (ACD) queue after pressing prescribed digit to talk to the agent but before being answered by the agent.		
		ACD should support Web based administration like adding new agents, assigning skills etc.		
		Supervisor should be able to do silent monitoring of calls. Supervisors should be able to barge in a agents call and also if required take a call from an agent and attend it.		

d] Call centre setup Integration with Bank's various Applications

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
a.	Core Banking System	Core Banking Interface - Bancs@24 – Core Banking solution *Touch points* 1. Call centre Functionality related to customer and account related information must be integrated with core banking system in on-line real-time mode. 2. Vendor should ensure that certain fields like account number would need to be masked to ensure data security. Detailed list of fields to be masked in CRM to be provided during requiremenets gathering phase		
b.	Exim Bill	Information regarding the trade finance inlcuding but not limited to status of LC/LG, LC limit/BG limit, Bills purchased under LC/Documentary DP, etc is available in this system. The system is accessible to branch. *Touch points* Status of LC/LG, LC Limit/BG Limit, Bills purchased under LC/Documentary DP		
c.	Demat / trading	DPSecure software is used for Demat Business. The software is used for opening of Demat Account, punching of the sale transaction of the share. Every sale of shares traded through the brokers are compulsorily routed through the depository (demat department) so that the balance in the shareholding of individual investor is updated. Besides this, maintenance of ISIN, dematerialisation of the share from physical to electronic format are incorporated in the system. *Touch points* Customers information regarding Demat Account, trading details, transaction details to be displayed in CRM		
d.	IB / Mobile Banking / SMS Banking / Telebanking	Activation of internet Banking/SMS/Tele/Moblle. Queries regarding reconciliation of taxes related to IB. Blocking of IB during emergency situations with proper verification from customers. *Touch points* Central point of integration for these functionalities with the CRM system is the IB database		

e.	**Mahasecure**	Mahasecure is BOM application which is installed by customers to login for internet banking. It is a safe and secured method for online netbanking transcations. It runs as client application. *Touch points* Mainly related to Status and password reset requests		
f.	**ATM switch / DCMS**	Bank is in the process of setting up its own ATM switch and DCMS. All card related activities like card processing, card issuance and activation, PIN generation, PIN,renewals, hot-listing ,re-issuance *Touch points* Currently handled by 3rd party - FSS. Hotlisting / blocking handled by FSS currently. In future, these requests need to be handled by the Contact centre.		
a.	**IVR - Interfaces and Hardw**	Integration with the IVR for Tele-banking		
		Integration with the ACD		
		Integration with CTI		
		ODBC interface for all types of databases		
		Integration with core banking system in on-line real-time/ batch mode as applicable		
		Integration withDCMS for exchanging debit card details		
		Integration with ATM switch and Internet Banking/Mobile Banking and any other software which bank desires at any point of time.		
		All the agents should have either an IP hardphone or IP softphone option. IP phone should have a separate headset jack.		
		Besides the above integration system, the CRM solution should be capable of redirecting to other applications through direct links from within the CRM interface		
		The solution should also support standard excel/ csv file uploads for uploading of relevant data.		

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
		The Call centre CRM should be able to support all functionalities given below: 　o All agents should capture/log details of each call in the CRM system which should be easily accessible by the Bank's officials 　o Relevant screen pop-ups to the agents along with the details of previous calls during the last 30 days, on the agents desktop on the basis of CLI, DNIS (Dialled number identification sequence) etc. 　o CRM system should capture all customer related interactions (queries / complaints / enquiries) through various channels like Call, Email etc. Bank shall consider social media as a channel, over a period of time 　o CRM system should have screens for creating and tracking interactions related to queries, requests and complaints and also for creating and managing campaigns and leads 　o Bank may use the Vendor CRM for reddressal of complaints and Leads management. For extending the 　　 vendor CRM, bank will not pay any additional cost.Vendor must ensure that licensing should not be any issue for usage in respect of users / branches		
		In case customer has not logged in through T-PIN (not having phone banking facility) , then allow for manual verification through the following data from the Pop-Up Screen within CRM 　　o Date of Birth 　　o Place of Birth 　　o Mother's maiden name 　　o Contact Number 　　o PAN /TAN 　　o Aadhar 　　o CIF Number 　　o CustomerName 　　o ATM Card Number 　　o Any other identifier which bank decides		

		The contact centre Pop-Up screen in CRM must have these summary items as first screen that is immediately seen on call being routed to the Agent:		
		o Name		
		o Mothers maiden name		
		o Residential Address		
		o Office Address		
		o Contact No. (Office, Home, Cell No.)		
		o Date of Birth		
		o PAN /TAN		
		o Aadhar		
		o Debit card no/Credit card no		
		o Customer Constitution		
		o Total assets, liabilities and profitability of the customer and networth of the customer, Interest paid by the bank and interest charged by the bank, Fee based income		
		o KYC status of the customer along with details of various KYC submitted by the customer.		
		o CIF Number		
		o Debit card no/Credit card no, Card Limit, card expiry date, Card Name, Card Brand Type, reward Points outstanding, Reward point expiry date, Credit card Balance o/s and Last repayment details		
		o List of various other services availed by the customer through bank like Insurance scheme details, Demat, Trading Investment, Locker, NPS details etc.		
		o Last 5 Credit Transactions (Overall across all channels and all accounts with account number mentioned)		
		o Last 5 Debit Transactions (Overall across all channels and all accounts with account number mentioned)		
		o Last 5 Internet Banking Transactions (Overall across all accounts with account number mentioned)		
		o Last 5 ATM Transactions (Overall across all accounts with account		
		CRM should allow agents to see all the accounts associated with the customer called (Owned, Joint a/c holder, Guarantor or any other relationship)		
		CRM should allow agents to view details of accounts the customer has access to. The details include account number, account type, balances . The different types of accounts supported are operative account, loan accounts & deposit accounts.		
		CRM should allow agents to view various types of balances related to an account like account balance, available balance, Limit, DP, Uncleared balance, Hold Balance, Rate of Interest and Penal Interest Rate etc.		

a.	CRM	CRM should allow agents to view overdue Amount of various accounts held by the customer along with the IRAC status. Next Due date and Last installment paid date		
		CRM users should be able to query on account transactions based on various parameters including transaction date range, transaction amount range and transaction type		
		CRM system should have ability to sort all transactions based on date		
		CRM users should be able to view details of any transaction		
		CRM users should be able to view additional details of the loan account like Loan Expiry Date, Number of Principal Demand Installments in Arrears, Principal Demand Arrears, Number of Interest Demand Installments in Arrears.		
		CRM users should be able to view details of deposit accounts like Maturity date, Maturity Amount, Interest Rate, Tax deducted, Interest credited and projected interest of all accounts of the customers (to know the tax liability) and 15G, 15H submitted or not		
		CRM should allow users to view whether Life certificate is submitted or not in case of pensioner a/c, if submitted then date of submission		
		CRM system should be able to provide details whether nominee has been registered or not in operative accounts.		
		CRM users should be able to view collateral details of overdraft accounts including collateral type, collateral description and value.		
		CRM users should be able to view complete cash flow i.e. principal and interest flows attached to a particular loan account.		
		CRM users should be able to view loan account details including sanction date, sanctioned amount, disbursed amount and current liability, arrear details etc.		
		CRM users should be able to view the repayment schedule, disbursement schedule details and collateral details for loans		
		CRM system should enable setting up of calculators for assessing the interest payable on retail loans (based on the type of loan, tenor and payment option indicated by the user.		
		The Agent must have facility to mark calls as closed, open, call back on a certain date & time etc with his specific remarks in detail. System will route the call on reminder date and time to a Agent who is free for follow-up		
		All transactions within CRM should be audit trailed		
		All master data fields coming from core banking system should be read only within the CRM application		

		Product Sales on an Inbound call:
		    o The Agent will get a popup indicating the bank products that are suited for the customer when the customer
		      calls the contact centre Agent
		    o Based on this hints, the Agent will inform and try to sell a specific product to the customer
		    o Once the customer is informed of a specific product it will be marked as "Informed" so that it will not be repeated for a pre-defined time to that customer		

		CRM system should have appropriate escalation Management of open calls to senior agents/ supervisors/ branch officers		
		CRM system should have the ability to forward certain QRC's to branch as applicable. Branch officials should also receive email notifications when leads or QRCs are assigned to them		
		CRM system should have the ability to send emails and SMS notifications to customers at various key touchpoints		
		CRM system should have an effective feedback capture screen		
		CRM system should have ability to export data into different file formats		
		CRM system should have the ability to read birthday dates from CBS so that agents can wish the customers		

		CRM system should provide support for online performance management:
		    o Ability to define KPI's in the system
		    o Online view for the overall call centre performance against the defined KPI (Can be seen by Bank officers, Quality managers and Supervisors only)
		    o Online view for specific agent performance against the defined KPIs (can be shown by the agent him/herself or the Supervisor/Manager)		

		All security features must be enabled to ensure that Agent/contact centre cannot perform any debit / transfer transactions.		
		If customer is not able to perform card hotlisting through IVR (Ex: Does not have TPIN), CRM system should have the ability to open up the bank's portal from within CRM for agents to perform the hot-listing		

		Knowledge Base module is available with at least the following capabilities:
		    o Contact centre Procedures
		    o General information (Locations for branches and ATMs, Products information, Products/Services Fees)
		    o Changes in the products and services
		    o Frequently Asked Questions (FAQ)
		    o Configurable list of users who can edit the knowledge base database
		    o Searching capabilities in the knowledge base		

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments

a.	CTI	CTI should support the following features:
		    o Soft phone / hard phone, call pick up facilities through Agent desktop
		    o Call transfer systems for escalation of calls to supervisor, to other agents, along with screen popups and the interaction history, duly recorded
		    o Call 'HOLD' facilities, in order to facilitate the Agent to browse the information required to answer the request
		    o Call "Retrieve from Hold" facilities
		    o Call 'Conferencing' facilities, with supervisor, subject matter expert, etc
		    o Call 'Forward' facilities
		    o Intelligent transfer of calls (without disconnection of the call in case a call meant for one segment, lands on to the agent of another segment.)
		    o Echo cancellation feature- removal of echo that occurs when a caller speaks or dials during a prompt
		    o Call wrap up facilities with appropriate notes / comments, along Call Identification number		

		Agents to have a facility to transfer the call outside the contact centre domain, by placing an outward call to bank functional experts, if needed, by keeping call on conference		
		Agents to have an agent desktop software, agents log in, log out, and make themselves ready and not ready from the agent desktop application		
		Agents should have access to real-time statistics for themselves and the queues to which they are associated. For example, from the agent desktop application, agents should be able to see how many calls they have handled today and how many calls are currently in queue for their team.		
		Agents should be able to interact with their supervisor and other agents through text chat / messages.		
		Agents can be configured to enter reason codes for not ready and logout		
		CTI solution will provide for building the script for all types of customer interactions		
		The solution will have options to categorise the interactions in a systematic fashion compatible to the Bank, so that the retrieval becomes easy		
		The solution will have provision to automatically build the script on-line, through the Agent-Customer interaction process, by the authorised Agents / Supervisors		
		CTI solution will have provision to import scripts from remote locations, by functional experts		
		Ability to support auxiliary codes to enable call centre agents to indicate their current mode of operation (i.e. Available/Unavailable/Wrapping Up/At Lunch, etc…)		

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
a)	Dialer for outbound	An advanced dialer facility to run outbound calling for marketing, selling or recovery functions.		
		The solution will include a preview dialer system that automatically dials batches of telephone numbers for connection to agents assigned to sales or other campaigns.		
		The solution should be capable of creating and configuring campaigns. Supervisor should be able to specify a daily time range during which outbound calls are made. Supervisor should also be able to specify and import a list of customer contacts to be called.		
		Once the Campaign is started Agents should get the contact automatically and click to call the contact.		
		Agents should be able to accept, reject, or skip outbound call requests. Agents should also be able to reclassify calls to any one of many call results, such as Busy, Fax, and Answering Machine.		
		After an agent reclassifies a contact as "Do Not Call", the Administrator can remove this contact from the campaigns		

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
a.	Generic Reporting	Number and details of welcome calls made to customers		
		Number and details of collection calls made to customers and their outcome		
		Number of leads generated and qualified by Contact Centre/branch		
		Number of sales done by cross sell and upsell of products to existing customers		
		Caller IVR Selection (Start to Finish)		

		Total amount of time callers had been on IVR
		  o Detailed
		  o Summary		

		Number of calls
		  o Total Number of Calls
		  o Number of calls dropped on the IVR stage
		  o Number of Calls Diverted to contact centre Agents		

		Queues analysis
		  o Number of Calls
		  o Number of Waiting Calls
		  o Average Call Time
		  o Longest Waiting Time
		  o Abandoned Calls		

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
b.	Reports	Agent reports (Summary for All the Agents, Summary by Queue, and Detailed by Agent) o Login & Logout Time o Average Answer Time o Average Talk Time o Average Handling Time o Idle Time o Time Agent is Ready o Number of Web-Chats o Average Chatting Time o Number of Emails Received and Responded o MIS of recorded calls o Number of call-backs		
		Ability to provide real time call statistics as a dashboard.		
		Ability to provide real time call statistics display on a large LCD screen at the Contact Centre		
		Users of the Historical Reports should be able to perform the following functions: View, print, and save reports, sort and filter reports, send scheduled reports to a file or to a printer, export reports in a variety of formats, including PDF, RTF, XML, and CSV		
		All SLAs and KPIs to be tracked as per contractual requirements should be available as standard reports from the system.		

S.No.	Category	Description	Compliance (Yes / No)	Bidder Comments
a.	**Statutory Compliances**	The service provider, in the process of providing the services must comply with all the statutory/regulatory requirements. Following is an indicative (not exhaustive) list of such compliances required. o Compliance of TRAI Regulations o DND compliance o Compliance of Labor laws o Compliance of taxation laws o Compliance relating to software licenses o Compliance of local Govt. bodies rules o Compliance to DOT (Department of Telecommunication) guidelines		
		The Vendors shall be responsible for compliance of all laws, rules, regulations and ordinances applicable in respect of its employees, sub-contractors and agents. The Vendors shall establish and maintain all proper records including, but not limited to, accounting records required by any law, code, practice or corporate policy applicable to their from time to time, including records and returns as applicable under labour legislations		