

**SUPPLEMENTAL/BID BULLETIN NO. 3
For LBP-HOBAC-ITB-CS-20190114-01**

PROJECT : **Customer Relationship Management System**
IMPLEMENTOR : **Procurement Department**
DATE : **April 17, 2019**

This Supplemental/Bid Bulletin is issued to modify, amend and/or clarify certain items in the Bid Documents. This shall form an integral part of the Bid Documents.

Modifications, amendments and/or clarifications:

- 1) LANDBANK's responses to bidders' queries (Annex H) was added. Please see attached Annexes H-1 to H-13 of the Bidding Documents.
- 2) Eligibility Documents 4.2 & 9.2 of the Eligibility Data Sheet (EDS), Form No. 1 (Statement of All Ongoing and Completed Government and Private Contracts, Including Contracts Awarded but Not Yet Started) and Checklist of the Bidding Documents (Item No. 5) have been revised. Please see attached revised EDS and specific sections of the Bidding Documents.
- 3) The deadline of submission and the schedule of opening of eligibility/technical and financial documents/proposals for the above project is re-scheduled to **April 25, 2019, 11:00 A.M.** at the Procurement Department, 25th Floor, LANDBANK Plaza Building, 1598 M. H. Del Pilar corner Dr. Quintos Streets, Malate, Manila.



ALWIN I. REYES, CSSP
Assistant Vice President
Head, Procurement Department and
HOBAC Secretariat

Eligibility Data Sheet

Eligibility Documents	
1.2	No further instructions.
1.3	No further instructions.
2.1(a)(ii)	The statement of all ongoing and completed government and private contracts shall include all such contracts within three (3) years prior to the deadline for the submission and receipt of eligibility documents.
2.1(a)(ii.7)	Proof of satisfactory completion of completed contracts: <ul style="list-style-type: none"> ▪ Copy of Purchase Order or Contract or Certificate of Satisfactory Completion issued by the client
4.2	Each Bidder shall submit five (5) sets of Eligibility and Technical Component (First Envelope), Project Technical Component (Second Envelope) and Financial Component (Third Envelope) labeled as “Original Copy 1”, “Original Copy 2”, “Original Copy 3”, “Original Copy 4” and “Original Copy 5”. The Eligibility/Technical Documents shall be enclosed in the Eligibility/Technical Component (First Envelope) of the Bid.
4.3 (e)	The Procuring Entity’s BAC address is: Land Bank of the Philippines 25 th Floor, LANDBANK Plaza Building 1598 M.H. Del Pilar corner Dr. J. Quintos Streets Malate, Manila, 1004 Contact Person: Mr. Alwin I. Reyes, CSSP Assistant Vice President Head, Procurement Department 1598 M.H. Del Pilar corner Dr. J. Quintos Streets Malate, Manila, 1004 Fax (02) 528-8587 lbphobac@mail.landbank.com
4.3 (f)	Consultancy Services for the: <ul style="list-style-type: none"> ➤ Customer Relationship Management System ➤ LBP-HOBAC-ITB-CS-20190114-01

4.3 (f)	<p>Consultancy Services for the:</p> <ul style="list-style-type: none"> ➤ Customer Relationship Management System ➤ LBP-HOBAC-ITB-CS-20190114-01
5	<p>The address for submission of eligibility document/component is:</p> <p>Procurement Department Land Bank of the Philippines 25th Floor, LANDBANK Plaza Building 1598 M. H. Dell Pilar corner Dr. J. Quintos Streets Malate, Manila, 1004</p> <p>The deadline for submission of eligibility document/component is 11:00 A.M. on _____.</p>
8.1	<p>The place of opening of eligibility document/component is:</p> <p>Procurement Department Land Bank of the Philippines 25th Floor, LANDBANK Plaza Building 1598 M. H. Del Pilar corner Dr. J. Quintos Streets Malate, Manila, 1004</p> <p>The date and time of opening of eligibility document is 11:00 A.M. on _____.</p>
9.1	<p>Similar contracts shall refer to projects involving Information Technology hardware or software.</p>
9.2	<p>Minimum score to be included in the shortlist is seventy six percent (76%). The detailed set of criteria and rating system to be used are shown below.</p>

Revised Checklist of Bidding Documents for Procurement of Consulting Services

Documents should be arranged as per this Checklist. Kindly provide folders or guides, dividers and ear tags with appropriate labels.

First Envelope - Eligibility and Technical Components

• **The First Envelope shall contain the following:**

○ **Eligibility Documents – Class “A”**

Legal Eligibility Documents

1. Eligibility Documents Submission Form
2. PhilGEPS Certificate of Registration (Platinum Membership). All documents enumerated in its Annex A must be updated; or
 - Registration Certificate from SEC, Department of Trade and Industry (DTI) for Sole Proprietorship, or CDA for Cooperatives, or any proof of such registration as stated in the Bidding Documents;
 - Valid and current mayor's permit issued by the city or municipality where the principal place of business of the prospective bidder is located; and
 - Tax Clearance per Executive Order 398, Series of 2005, as finally reviewed and approved by the BIR.

Technical Eligibility Documents

3. Duly notarized Omnibus sworn statement (sample form - Form No.2)
4. Duly notarized Secretary's Certificate attesting that the signatory is the duly authorized representative of the prospective bidder, and granted full power and authority to do, execute and perform any and all acts necessary and/or to represent the prospective bidder in the bidding, if the prospective bidder is a corporation, partnership, cooperative, or joint venture (sample form - Form No.3).
5. **Revised Statement of the prospective bidder of all its ongoing and completed government and private contracts, including contracts awarded but not yet started, if any, whether similar or not similar in nature and complexity to the contract to be bid, within the relevant period as provided in the Bidding Documents. The statement shall include all information required in the PBDs prescribed by the GPPB. (sample form - Form No. 1). The duly signed form shall still be submitted even if the bidder has no ongoing contract. Copy of Purchase Order or Contract or Certificate of Satisfactory Performance issued by the Client must also be submitted as proof of satisfactory completion of completed contracts.**
6. Bid security in the prescribed form, amount and validity period (ITB Clause 15.1 of the Bid Data Sheet)

Financial Eligibility Documents

7. The prospective bidder's audited financial statements, showing, among others, the prospective bidder's total and current assets and liabilities, stamped "received" by the BIR or its duly accredited and authorized institutions, for the preceding calendar year which should not be earlier than two (2) years from the date of bid submission.
- **Eligibility Documents – Class "B"**
 8. Valid joint venture agreement (JVA), in case the joint venture is already in existence. In the absence of a JVA, duly notarized statements from all the potential joint venture partners stating that they will enter into and abide by the provisions of the JVA in the instance that the bid is successful shall be included in the bid. Failure to enter into a joint venture in the event of a contract award shall be ground for the forfeiture of the bid security. Each partner of the joint venture shall submit the legal eligibility documents. The submission of technical and financial eligibility documents by any of the joint venture partners constitutes compliance.
 - **Post-Qualification Documents – (Non-submission of the following documents may result in bidder's post-disqualification):**
 9. Business Tax Returns per Revenue Regulations 3-2005 (BIR No. 2550 Q) VAT or Percentage Tax Returns for the last two (2) quarters filed manually or through EFPS.
 10. Income Tax Return for 2017 filed manually or through EFPS.

Second Envelope - Project Technical Component

- **The Second Envelope shall contain the following:**
 1. TPF 1 – Technical Proposal Submission Form
 2. TPF 2 – Experience of the Firm/Consultant References
 3. TPF 3 - Comments and Suggestions of Consultant on the Terms of Reference and on Data, Services, and Facilities to be Provided by the Procuring Entity
 4. TPF 4 - Description of the Methodology and Work Plan for Performing the Project
 5. TPF 5 – Team Composition and Task
 6. TPF 6 – Curriculum Vitae for Proposed Professional Staff
 7. TPF 7 – Time Schedule for Professional Personnel
 8. TPF 8 – Activity (Work) Schedule
 9. Form No. 5 – Statement of Consultant's Nationality
 10. Form No. 6 – Deliverable Items Summary

11. Firm Credentials Information Sheet – Annex C
12. Customer Satisfaction Survey Forms – Annex D
13. Documentation as proof that the solution is in the magic quadrant
14. Project Team Information Sheet – Annex E
15. Requirements Compliance Form (RCF) - Annex B with Bidder's response to each requirement.
16. Implementation Methodology Document
17. Proof of Support Center within the Philippines
18. Brief Company Profile
19. Certification and Brief Description of the Business Continuity Plan (BCP) of the bidder with reference to the proposed solution
20. Certification that the bidder has a well-defined security policies and procedures in place to ensure confidentiality, integrity and availability of Bank's data and privacy of personal information
21. Draft Contract containing the terms and conditions specified in Annex F. General Guidelines Section 7. Outsourcing Process, item e. Contract and Service Level Management of Administrative Order No. 013 Series of 2018 Guidelines on Outsourcing
22. License Agreement
23. Service Level Agreement (SLA) for the maintenance and support to all software components which shall include details on production incidents as to Severity, Response Time, Resolution Time and Permanent Solution.
24. Source Code Review Confirmation/Report
25. Cryptographic Architecture

Third Envelope - Financial Component

- **The Third Envelope shall contain the following:**

The following must be duly filled out and signed by the bidder's authorized representative:

1. FPF 1 – Financial Proposal Submission Form
2. FPF 2 – Summary of Costs
3. FPF 3 – Breakdown of Price per Activity
4. FPF 4 – Breakdown of Remuneration per Activity
5. FPF 5 – Travel Expenses, Office Rent, Accommodation and Clerical Assistance
6. FPF 6 – Miscellaneous Expenses

CLASS C

ITEM NO. LBP-HOBAC-ITB-CS- 20190114-01	LANDBANK CRMS REQUIREMENTS SECTION PROJECT SCOPE	TP/SALESFORCE QUESTION	LANDBANK RESPONSE
3	<p>The scope of the Project includes implementation of a Customer Relationship Management System – Customer Service Module in a pure cloud environment wherein both application and database servers reside in a private cloud.</p>	<p>On the TOR requiring "Private Cloud", we interpret the requirement to be that of being able to have full control of your data, and not making your data visible and accessible by other customers.</p> <p>With Salesforce we have a different approach to this. Please confirm that our approach is acceptable to Land Bank.</p> <p>Salesforce uses a best-in-class, highly secure, highly scalable and highly reliable single and shared cloud infrastructure and services with "multi-tenancy". What "multi-tenancy" means is that even with this single, shared cloud infrastructure and services, each customer gets their own "instance of Salesforce" in our cloud, and it is such where the customer's data is totally separated from other customers, and the customer has full control over their data. This also means a customer can totally tailor its configuration of Salesforce for its own unique requirements and continue to innovate for themselves. Every customer in our platform have absolutely no visibility and access to another customer's data.</p> <p>Because of Salesforce's single cloud infrastructure with multi-tenancy approach, we do not need to maintain multiple version of our platform and technology. That means all our R&D resources, time and effort are effectively spent and focused on making this single cloud infrastructure of ours, best-in-class. With this approach, Salesforce is able to deliver continuous innovation, with three major upgrades a year (Salesforce is the only provider in our space that does 3 upgrades a year), fully</p>	<p>For LBP, Private cloud means that software and infrastructure will be exclusive for LANDBANK's use. Thus, multi-tenancy is not acceptable.</p>

CLASS C

		<p>handled by Salesforce. And because it is a single cloud infrastructure with multi-tenancy, every customer benefits from this continuous innovation and painless upgrades, and they will always have the latest and greatest version of the Salesforce platform. Straying from this single cloud infrastructure with multi-tenancy approach would compromise our ability to deliver innovation, and we don't want that.</p> <p>With regards to security, not only do we have our internal audit and compliance team to make sure our security meets the standard, we are also 3rd party certified. Just to name a few, we are ISO27001, ISO27018, ISO 27017, SOC1, 2 and 3 certified. Salesforce is also compliant with PCI DSS and FedRamp. We are very transparent with all this and so you can get more details about Salesforce cloud performance, compliance and security in https://trust.salesforce.com</p> <p>Please confirm that LANDBANK expects the Software Upgrades to be FREE of CHARGE? -</p>	
3.d	Project Scope	<p>The bidder is expected to deliver a Customer Relationship Management System – Customer Service Module inclusive of the following components: d. Software updates.</p>	<p>Yes.</p>
8	Proposal Requirements	<p>H Other Requirements: 2 Certification and Brief Description of the Business Continuity Plan (BCP) of the bidder with reference to the proposed solution</p>	<p>Certification that Bidder has BCP in place.</p>
8	Proposal Requirements	<p>3 Certification that the bidder has a well-defined security policies and procedures in place to ensure confidentiality, integrity and availability of Bank's data and privacy of personal information</p>	<p>Certification or any equivalent document that certifies that bidder has a well-defined security policies and procedures in place to ensure confidentiality, integrity and availability of Bank's data and privacy of personal information (e.g., SAS70)</p>

CLASS C

8	Proposal Requirements	7. In compliance with the Bank's Administrative Order (AO) 100 Series of 2018 on Payment Card Industry Data Security Standards (PCIDSS) Policy Set, the following documentation shall also be provided: § Source Code Review Confirmation/Report § Cryptographic Architecture	Can we submit our PCIDSS Compliance Certificate in lieu of this requirement?	No. PA-DSS certification is not applicable for CRM application since it is not a settlement and authorization application.
9	Technical Criteria	1. Firm Credentials (Experience, Expertise and Capability) a. Years of experience - At least three (3) years of relevant experience in successfully implementing the proposed solution	Please confirm that LANDBANK expects that the relevant experience in successfully implementing the proposed solution refers to the VENDORS implementation of CRM - Customer Service in CLOUD in at least one commercial bank or any of the top 500 companies in the Philippines?	LBP requires that Bidder has 3 years of experience in implementing a CRM Customer Service solution in any industry and in any location.
9	Technical Criteria	b. Local Implementation - At least one (1) Philippine implementation of the proposed solution in a commercial bank or Top 500 companies in the Philippines	Please confirm the required local implementation of the proposed solution refers to the VENDORS local Implementation of CRM - Customer Service in CLOUD in at least one commercial bank or any of the top 500 companies in the Philippines?	LBP requires that the bidder has implemented a CRM Customer Service Solution in a commercial bank or Top 500 companies in the Philippines.
	General Questions		Is LANDBANK using any existing telephony system that will be integrated with Salesforce for CTI function?	Yes, Avaya.
	General Questions		Can we have a copy of the APPENDIX 1 file for the initial list of Data Fields for Ticket Entry)? -	Yes, please refer to Appendices attached to the BRD.
	General Questions		Can we have a copy of Appendix 5, 6, and 7 for initial list of sub-classifications	Yes, please refer to Appendices attached to the BRD.
CRM 01-045	LBP_ANNEX B RCF	The system shall not allow multiple ticket entries based on set parameters.	What are examples of set parameters for ticket uniqueness	This refers to duplicate tickets or existing tickets. For example: same customer name, date and concern type

CLASS C

CRM 01-046	LBP_ANNEX B RCF	The ticket shall have a field to indicate the result of the identity- verification process/KYC. (e.g. Passed, Failed)	What are other KYC details that need to be stored in the system (Salesforce)?	LBP will not require storing of KYC details since these are already in the system. However, LBP will require a field to tag the result of KYC process as passed or failed.
CRM 01-066	LBP_ANNEX B RCF	The system shall be able to classify feedback as positive or negative based on a numerical rating given by customer. For example: 3-5 – Positive 1-2 – Negative	can we have a sample customer survey form - is this ANNEX D (Customer Survey Form) in Bid Docs?	No, Annex D is for Bidder's customer; Please see attached sample incident survey form (Exhibit 4).
CRM 01-074	LBP_ANNEX B RCF	The system shall be able to synchronize data in the CRM system with data in the e-mail application used by the bank.	Contacts and Calendar is enough to sync from Email platform to Salesforce?	Concerns that will be received in LBP's email system shall be automatically replicated in the CRM system.
CRM 09-017	LBP_ANNEX B RCF	Initialization, stopping or pausing of the audit logs	Subject and Email body enough to create Case from Email? why is there a need to stop logging audit logs? -	No auto creation of tickets, tickets are always initiated by the agents. This is one of PCIDSS requirements; all the activities in the system must be logged including initialization, stopping or pausing of audit logs if applicable. Yes, including view access.
CRM 09-012	LBP_ANNEX B RCF	The system shall be able to capture the following logs: · All individual user accesses to cardholder data The system shall be able to trigger an automated feedback request message to clients after closing a ticket. Business Rule: Applicable to Incident Tickets only For example: Sending of survey via SMS or email	Including view access? Can it be Email only? Does LANDBANK have existing SMS gateway provider?	For now LBP will use email only.
CRM 01-065	LBP_ANNEX B RCF	automatically send an acknowledgement message after receiving an e-mail.	Acknowledgment message through what? Define user story for this requirement	This refers to auto acknowledgement that advises the customer of the receipt of the email.
CRM 01-073	LBP_ANNEX B RCF	The system shall be able to synchronize data in the CRM system with data in the e-mail application used by the bank.	what is the email platform used by Landbank? (eg. Gmail, Outlook, etc)	IBM Lotus Notes
CRM 01-074	LBP_ANNEX B RCF			

CLASS C

CRM 01-079	LBP_ANNEX B RCF	The system shall be able to support different formats to display data (e.g. open tickets, tickets beyond turnaround time) on the dashboard. (e.g. graphs, tables, lists)	sample reports and graphs?	We don't have sample reports and graphs; this will be part of the design phase of the project.
CRM 01-086, CRM 01-087	LBP_ANNEX B RCF	Account details of existing product holdings with LBP	integration with Core for product holdings and financial info expected?	This will be retrieved from Data Warehouse of the Bank
CRM 01-093	LBP_ANNEX B RCF	The system shall be able to display the following customer information for private institutional customers (Refer to Appendix 3): · Customer number	list of fields for each information section? -	Please refer to BRD Appendices.
CRM 02-006	LBP_ANNEX B RCF	The system shall automatically update customer information based on data captured from the data warehouse.	is Landbank data warehouse capable of API? - What is the platform used by DW? -	Yes, DW is capable. DB - Oracle; ETL - Informatica
CRM 02-007	LBP_ANNEX B RCF	The system shall support multiple methods for capturing/synchronizing data.	What channels will the cases originated from?	This refers to loading and reloading of data from DW and email application of the Bank.
CRM 03-003	LBP_ANNEX B RCF	The system shall be able to process huge amounts of data in real-time. For example: · Sending of Tickets to Fulfillment Unit · Email facility	sample bulk transaction counts? -	Total tickets in a day = 686 tickets
CRM 05-001	LBP_ANNEX B RCF	generate reports required by the Bank. (Refer to Appendix 8 for List of Reports)	Sample reports? -	Please refer to BRD Appendices.
CRM 08-058	LBP_ANNEX B RCF	The system shall be able to encrypt transmission of cardholder data across open, public networks. For example: If web-based should be https with TLS 1.2	card holder data will be exchanged to/from what systems? -	DW to CRM - for the customer information for this phase of the project.
1.3.1. Assumptions	ANNEX A BRD	The CRMS will interface with both the Bank's source systems and third-party system	are these systems capable of API's? Sample API structure for each? What are these systems? -	DW, Avaya, Lotus Notes, SMS.
1.3.2.1. System Constraints	ANNEX A BRD	System Constraints - Data from the Bank's source systems may be limited and incomplete	Have LANDBANK started data assessment activities to make sure that data for CRMS is business-ready?	Yes.

CLASS C

CRM 01-039	ANNEX A BRD	The system shall be able to log the length of calls received.	Telephony system of LANDBANK should have this information. What is the bank's existing telephony system?	Avaya.
CRM 01-045	ANNEX A BRD	The system shall not allow multiple ticket entries based on set parameters.	What is a ticket's unique identifier? (eg. Email address + case type + subcategory)	Name, Date and Ticket Number.
CRM 01-122	ANNEX A BRD	The system shall have a facility to approve any user-initiated action done on the system. For example: Creation, Editing, Enabling, Disabling, Deletion Business Rule: Follow the Maker-Checker principle	Who are the approvers? - How many levels of approvals? Approvers are licensed system users too, is this ok with LANDBANK?	Supervisory level. One (1). Yes.
CRM 01-123	ANNEX A BRD	The system shall have a facility to allow the user to edit and manage business parameters.	sample business parameters?	Ticket Turn-around time, create new ticket concern, etc.
CRM 01-125	ANNEX A BRD	The system shall have a facility to allow a user to upload data in various formats. For example: Downloadable Forms	various formats? Csv files are used to upload to Salesforce, is this ok with LANDBANK?	This is not ok with LBP; we need to upload various formats like PDF, JPEG, Text Files.
CRM 02-005	ANNEX A BRD	The system shall be able to capture the required data (e.g. hand-off files) from the Data Warehouse.)	OK to do this once a day, batch?	Yes
CRM 04-001	ANNEX A BRD	The system shall comply with the existing IT hardware, database and operating systems architecture of the bank. (e.g. AIX, LINUX, and Windows).		What is the clarification regarding this requirement?
CRM 04-006	ANNEX A BRD	The system shall have a facility to automatically run a batch process after detecting the trigger file that indicates readiness of required data from the Data Warehouse.	Is LANDBANK ok to push data to Salesforce? - If not, are APIs ready for Datawarehouse? What is the type of API DW has? Can we have sample API call code structure used by other applications currently integrating to DW?	Yes, through upload file that triggers the start of the batch process.
CRM 05-003	ANNEX A BRD	The system shall allow dashboards, reports and raw data to be extracted in the ff formats: Excel, PDF, Word, CSV	Are these files need to be sent via email and need to be protected with passwords upon opening of the file by the email recipient?	If system is capable, yes. In addition, if data contains the cardholder information (e.g. Card number), yes the card number in the reports shall be masked.
CRM 05-013	ANNEX A BRD	The system shall be able to alert and notify through e-mail the reviewer or approver if an item has been sent for	What should be reviewed? the reports?	Yes, the reports.

CLASS C

		review.		
CRM 06-008	ANNEX A BRD	The vendor must comply with the Bank's Requirements Tracking Matrix (RTM).	Is this the same list of requirements listed in the LBP_ANNEX B RCF, ANNEX A BRD, and LBP_ANNEX A BRD files? or is there any specific RTM other than these? Reports are sent through the file attachments (Word, PDF, Excel, etc)? encrypted with passwords?	Yes requirements in the BRD, RCF and RTM are the same.
CRM 08-060	ANNEX A BRD	encryption/decryption technologies for the reports to be sent to users.		If data contain the cardholder information (e.g. Card number), yes the card number in the reports shall be masked.

Exhibit 4



Land Bank of The Philippines Incident Survey Form

Customer Name:	CIR No.	Date:
1. Where did you access information on how to make a complaint to Land Bank of The Philippines?	<input type="checkbox"/> Website <input type="checkbox"/> Branch / Office <input type="checkbox"/> Other; Please Specify _____	
2. Did you find it easy to let us know of your complaint?	<input type="checkbox"/> Yes. It was very easy <input type="checkbox"/> Yes. It was easy <input type="checkbox"/> No. It was difficult. If so, what are the difficulties you experienced? _____	
3. Have we provided you with the following? (Please put a check mark before the appropriate answer) a. Acknowledgement letter* within 2 banking days: ___ Yes ___ No b. Resolution within the stated time frame: ___ Yes ___ No (If no, please specify the no. of days delay___)		
<i>*Not applicable for complaints lodged thru personal visit or phone</i>		
4. How would you rate the overall professionalism of our personnel who handled your complaint?	<input type="checkbox"/> Very Good <input type="checkbox"/> Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Needs Improvement. If so, please provide your comments _____	
5. With the resolution to your complaint, how would you rate the following: (Please put a check mark before the appropriate answer) a. Thoroughness of investigation; ___ Very Good ___ Good ___ Satisfactory ___ Needs Improvement b. Completeness of information; ___ Very Good ___ Good ___ Satisfactory ___ Needs Improvement If your answer is "Needs Improvement", please provide us your comments: _____ _____		
6. Overall, how would you rate our complaint handling process?	<input type="checkbox"/> Very Good <input type="checkbox"/> Good <input type="checkbox"/> Satisfactory <input type="checkbox"/> Needs Improvement. If so, please provide your comments _____	
7. Please give any suggestions on how can we improve our service? _____ _____		
Thank you. _____ Signature Over Printed Name		

CLASS C

CRMNEXT / TIM - Query	
1	What are the various sources of the customer maintained ?
2	What are the channels through which customer can interact with bank for customer service ?
3	Please share list of systems that needs to be integrated with new CRM system?
4	Which enterprise Document Management System (DMS) is being used by bank?
5	What CTI solution is in use by the bank?
6	How many personnel from business side and IT users that needs to be trained?
7	Training sessions are required to be conducted both prior and after the go-live of the applications. What is the use case?
8	What is the training schedule?
9	Should all the documents in English only?
10	Please state the number of branches for CRM roll-out?
11	Customer Self-Service : Our understanding is that Landbank - already have a customer self-service portal and from that portal customer can fill a web form to create case related to Landbanks product and services. Then this case will be pushed to CRMNEXT via integration. Please validate our understanding.
12	Please explain about preferred implementation approach i.e. On-premise implementation or On-cloud implementation.
13	What is integration strategy? Is it through a Middleware ?
14	Our understanding is that that system shall be used only by Land Bank employees and not by end customers. Please confirm
15	Our understanding is that that system shall be used by Land Bank employees only not by external Agents / Brokers. Please confirm
16	Is there any expectations on AMC period post implementation ?
17	Please confirm the bank shall have a project manager at their end to
	For the customer information- Data Warehouse only
	Over-the-counter transactions and e-banking channels.
	DW, email application, telephone system, SMS.
	LBP has existing document system.
	Avaya.
	More or less 100 pax.
	Please clarify.
	To be determined during early part of Test Phase prior to start of UAT.
	Yes.
	20 licenses will be assigned to Branches Group for branch users.
	Yes, LBP has contact us feature in LANDBANK Website, queries are sent from website to designated email address (lotus notes) of Customer Care Center (CCC).
	LBP requirement is to have a CRM Customer Service Solution that will be on private cloud i.e., software and infrastructure will be exclusive for LANDBANK's use.
	Please clarify.
	Yes.
	Yes.
	AM will kick-in after 90 days warranty period.
	Yes.

CLASS C

	manage project management activities of the bank																													
18	Is there any Data and Document Migration envisaged?	Initial data loading will be performed; regular updating of data will be done through a batch process.																												
19	Extract, transform and load data from all source systems. Vendor is CRM application vendor and does not perform ETL. We expect the bank to provide data in required format. Please confirm our understanding.	Yes.																												
20	We assume that Straight Through Processes (STP) is not needed in current scope of Service Request Management? We are not factoring the efforts for the same in scope ? Please validate our understanding.	What is STP? Please clarify.																												
21	What are the systems planned to be sun-set by implementation?	None.																												
22	Please define the Number of Users ,i.e, per department.	<p>Please see below total no. of users:</p> <table border="1" data-bbox="718 145 1436 974"> <thead> <tr> <th>Servicing/Fulfillment Units</th> <th>Allotted Number of User License</th> </tr> </thead> <tbody> <tr> <td>Customer Care Center (CCC)</td> <td>80</td> </tr> <tr> <td>Branches Groups (For Branches)</td> <td>20</td> </tr> <tr> <td>Branch Banking Services Department (BBSD)</td> <td>2</td> </tr> <tr> <td>Credit Card Administration Department (CCAD)</td> <td>9</td> </tr> <tr> <td>Electronic Products Department</td> <td>9</td> </tr> <tr> <td>ATM Operations Support Department (AOSD)</td> <td>6</td> </tr> <tr> <td>MDS and Collections Management Department (MCMD)</td> <td>6</td> </tr> <tr> <td>Systems Implementation Department (SID)</td> <td>4</td> </tr> <tr> <td>Debit Cards and ATM Management Department (DCAMD)</td> <td>4</td> </tr> <tr> <td>Lending Support Department (LSD) (for Lending Groups and Lending Centers)</td> <td>2</td> </tr> <tr> <td>Treasury Support Department (TSD)</td> <td>2</td> </tr> <tr> <td>Agrarian Services Group (ASG) Support Unit</td> <td>2</td> </tr> <tr> <td>Overseas Remittance Marketing and Support Department (ORMSD)</td> <td>2</td> </tr> </tbody> </table>	Servicing/Fulfillment Units	Allotted Number of User License	Customer Care Center (CCC)	80	Branches Groups (For Branches)	20	Branch Banking Services Department (BBSD)	2	Credit Card Administration Department (CCAD)	9	Electronic Products Department	9	ATM Operations Support Department (AOSD)	6	MDS and Collections Management Department (MCMD)	6	Systems Implementation Department (SID)	4	Debit Cards and ATM Management Department (DCAMD)	4	Lending Support Department (LSD) (for Lending Groups and Lending Centers)	2	Treasury Support Department (TSD)	2	Agrarian Services Group (ASG) Support Unit	2	Overseas Remittance Marketing and Support Department (ORMSD)	2
Servicing/Fulfillment Units	Allotted Number of User License																													
Customer Care Center (CCC)	80																													
Branches Groups (For Branches)	20																													
Branch Banking Services Department (BBSD)	2																													
Credit Card Administration Department (CCAD)	9																													
Electronic Products Department	9																													
ATM Operations Support Department (AOSD)	6																													
MDS and Collections Management Department (MCMD)	6																													
Systems Implementation Department (SID)	4																													
Debit Cards and ATM Management Department (DCAMD)	4																													
Lending Support Department (LSD) (for Lending Groups and Lending Centers)	2																													
Treasury Support Department (TSD)	2																													
Agrarian Services Group (ASG) Support Unit	2																													
Overseas Remittance Marketing and Support Department (ORMSD)	2																													

CLASS C

		Trust Business Development Department (TBDD)	2
		TOTAL	150
23	Is there an existing document management system with which CRM has to integrate	None.	
24	Is there an existing CRM or is it a greenfield project	None.	
25	Please provide the list of the systems/applications/products which you are looking to integrate with CRM	DW, email application, telephone system, SMS.	
26	If you have an existing CRM, what are the challenges which you are facing with existing System(if any)	Not Applicable.	
27	Please share the current IT Landscape (architecture diagram)	Relevant information will be shared to the solution provider after the contract signing .	
28	Do you have the following stacks as part of the IT landscape? If yes, kindly revert with the names of the systems. <ul style="list-style-type: none"> - Core System - Master Data Management (Customer Master) - DWH - Middleware/ ESB - Service management - Card System - Analytical / BI, if any - HRMS - AD - SMS Gateway - Email Gateway - CTI/IVR, if any - DMS(Doc. Management System), if any - Any other system 	Relevant information will be shared to the solution provider after the contract signing	

CLASS C

For Sizing purposes (and year on year growth):

	CRMNEXT/TIM – Query Assumptions for sizing	Y1 (Current Year)	Y2	Y3	Y4	Y5	YoY Growth %	LANDBANK RESPONSE
1	Total Number of named Retail Banking Users (Web)							What do you mean by user? Bank Clients? Bank Personnel? Please clarify.
2	Number of concurrent Retail Banking users (Web)							
3	Total Number of named Corporate Banking Users (Web)							
4	Number of concurrent Corporate Banking users (Web)							
5	Number of Retail Customers	7,265,634	8,051,788	8,923,005	9,888,489	10,958,441	10.82%	
6	Number of Corporate Customers	203,545	215,250	227,628	240,718	254,561	5.75%	
7	Number of Cases	188352	216,604	249,095	286,459	329,428	15%	
8	Number of Activities (meetings/ calls/ emails) per case	2	2	2	2	2		
9	Number of Product Holdings per customer	3	3	3	3	3		
10	Number of Branches	20						Unable to provide projection since no basis yet. First year volume of cases will be the basis for the increase of the number of users for the branches.
11	Internet connectivity in Branches							All branches have internet connection

CLASS C

Particulars for sizing		LANDBANK RESPONSE
1	Please specify number of years for the required hardware sizing	5 years
2	CRMNEXT supports both MS SQL and Oracle .Please mention your preferred database (oracle/ MS Sql)	Either of the two is supported by the Bank
3	Does the Customer require a separate DR setup? If yes, please mention the DR capacity i.e. it is required @ 100% DC capacity or less.	Yes, DR with 50% capacity of production
4	Where would the DC, DR sites to be considered?	Since solution is on cloud, DR sites shall be maintained by the solution provider regardless of location
5	Does the production environment require high availability?	Yes
6	Please share Purging policy percentage for volume data at the end of each year	Since the roadmap is to implement the analytics functionality by year 3, purging policy is not applicable for the first 3 years. However, this must be considered in providing the hardware sizing to maintain acceptable response time of the system.
7	Does the deployment architecture need to include DMZ for mobile and external users.	Not applicable for Customer Service Module.

NOTE: This is based on the Projected sizing for the initial implementation.

Kindly confirm which of the environments to be considered for Sizing.		LBP Response Yes / No
1	Production	Yes
2	Pre-Production	No
3	Staging / UAT	Yes
4	SIT	No
5	Reporting Server (Optional)	No
6	Development (Optional)	No
7	Training (Optional)	No
8	Disaster Recovery (50%)	Yes