KENYA REVENUE AUTHORITY
ISO 9001:2015 CERTIFIED

UNIFIED SERVICE PORTAL & ENTERPRISE OMNI-CHANNEL CUSTOMER RELATIONSHIP MANAGEMENT & OTHER CUSTOMER SUPPORT SOLUTIONS REQUIREMENTS

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CLAUSE BY CLAUSE-TECHNICAL REQUIREMENTS

TECHNICAL SPECIFICATIONS FOR SUPPLY, DELIVERY, CONFIGURATION, TRAINING, SUPPORT & MAINTENANCE OF A UNIFIED SERVICE PORTAL & ENTERPRISE OMNI-CHANNEL CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

1.0 Executive Summary

This document contains several sections combining various functionalities of a Unified service portal and a Customer Relationship Management System, with the respective components**.**

The document is divided into four major sections as follows:
a. Vendor Evaluation
b. Scope & Implementation approach
c. Functional requirements
d. Non-functional requirements
e. Training & Knowledge Transfer

The functional requirements include the following:

1. Unified Service Portal
2. Enterprise Omni-channel Customer Relationship Management System
3. Integrated Marketing Solution
4. Integrated Voice Solution
5. Social Media Management & Sentiment Analysis tool
6. Feedback Management Tool
7. Electronic Queue Management System
8. Generative AI Bot

1.1 Background

The Kenya Revenue Authority's (KRA) 9th Corporate Plan identifies 'digitalisation of revenue administration' as a key strategic goal for the plan period. Additionally, the Plan highlights 'customer-centric service delivery' as one of the strategic issues of focus during the same period. In view of this strategic direction, it is imperative to align customer experience to the digitalization of revenue administration agenda.

The Omni-channel Customer Relationship Management (CRM) & a Unified Service Portal project is aligned to ensuring that the Authority has the capacity to widen the scope of services with intention of instituting best practice in Customer Experience specifically in its core revenue service delivery mechanisms. In essence, service excellence will enhance customer satisfaction that translates to supporting taxpayers in voluntarily complying with their tax liabilities and obligations.

The enterprise Omni-channel CRM & a Unified Service Portal system will help in managing customer (Taxpayer) interactions data and automate end to end customer issues management/escalation across all tiers (Frontline, Business and Technical teams).

2.0 Goal

The enterprise CRM system will help to manage customer (Taxpayer) interactions, data and facilitate automation of end-to-end customer issues management/escalation across all tiers (Frontline, Business and Technical teams).

3.0 Detailed Objectives and Expected Outcomes

3.1. Enhance Taxpayer Service and Support

- *Objective:* Improve service delivery by providing a centralized platform for managing taxpayer service requests, complaints, and inquiries.

- *Outcome:* Faster resolution of issues and better management of service requests through automated workflows and tracking.

3.2. Centralize and Manage Taxpayer Data

- *Objective:* Create a unified, comprehensive view of each taxpayer's information to ensure accurate data management and facilitate better decision-making.

- *Outcome:* A Single View of Customer Data that aggregates tax records, service requests, and communication history, enabling personalized and efficient interactions.

3.3. Streamline Communication and Engagement Channels

- *Objective:* To provide a seamless and consistent experience across all touchpoints by integrating multiple communication channels (email, phone, social media, web, etc.).

- *Outcome:* A robust **Omni-Channel Management** system that improves engagement with taxpayers across various platforms and supports efficient issue resolution.

3.4. Improve Service Level Agreement (SLA) Compliance

- *Objective:* To ensure timely resolution of service requests by automating the tracking of Service Level Agreements (SLAs.

- *Outcome:* An **SLA Management System** that ensures all service requests are addressed within the agreed-upon time frames, leading to higher satisfaction.

3.5. Enhance Self-Service Capabilities

- *Objective:* To provide taxpayers with a simplified platform to enable them resolve common issues, access information, and perform basic services without needing direct interaction with KRA staff.

- *Outcome:* A **Self-Service Portal** and **Chat Bot Support** that empower taxpayers to submit requests, access their records, and get real-time assistance.

3.6. Automate and Optimize Workflow Management

- *Objective:* To enhance operational efficiency and reduce manual errors by automating business processes and workflows, such as complaint routing, task assignments, and approval processes.

- *Outcome:* A fully configured **Workflow Management System** that ensures proper task delegation, follow-ups, and escalations.

3.7. Facilitate Knowledge Sharing and Empower Staff

- *Objective:* To reduce the turnaround time for resolving taxpayer queries and improve overall service delivery by equipping KRA staff with a knowledge base.

- *Outcome:* A **Knowledge Management** system that stores and organizes frequently asked questions, tax laws, guidelines, and best practices for easy access by staff.

3.8. Improve Reporting and Analytics Capabilities

- *Objective:* To provide detailed insights into taxpayer behaviour, service request patterns, and operational performance to guide strategic decisions and policy-making.

- *Outcome:* **Customizable Reports** and **Dashboards** that provide real-time data on key metrics such as taxpayer satisfaction, SLA compliance, and service trends.

4.0 Scope of Work

The implementation scope will cover at minimum the following areas;

4.1 Summary of the Technical Requirements

Functional Requirements

1. Unified Taxpayer Portal
2. Service Requests & Complaints Management-Taxpayer
3. Service Requests & Complaints Management-User
4. Contact Management
5. Workflow Management
6. Service Level Agreements (SLA) Management
7. Single View of Customer Data
8. User Interface Customization
9. Omni-Channel Management
10. Self-Service Options Design and Configuration
11. Knowledge Management
12. Collaborative Spaces
13. Self Help-Chat Bot Support
14. Notifications-User
15. File Management
16. Feedback Management
17. Electronic Queue Management & Appointment Booking
18. Integration Requirements
19. User Management/Administration Functionalities
20. Reports and Analytics
21. Network Communication and Session Management
22. Voice solution (Call Centre)
23. Workforce Management (Omni-channel)
24. Interaction Quality Monitoring & Evaluation (Omni-channel)
25. Generative AI Chat Bot Support
26. Single Sign-On
27. Social Media Management

5.0 Expected Results (Deliverables)

1. Unified Taxpayer Portal
2. Service Requests & Complaints Management Systems (for both Taxpayers and Users)
3. Contact Management Module
4. Workflow Automation and Management
5. SLA Tracking and Management
6. Unified Customer View
7. Customized User Interface
8. Omni-Channel Management Integration
9. Self-Service Portal and Chat Bot
10. Knowledge Base and Collaborative Spaces
11. Feedback Management System
12. File Management System
13. Integration Plan and Implementations
14. User Management/Administration Features
15. Dynamic Reports and Dashboards
16. Security Features and Compliance

17. Call Centre Voice Solution
18. Network Communication and Session Management Plan
19. Omni-channel Workforce Management Module
20. Omni-channel Interaction Quality Monitoring & Evaluation Module
21. Generative AI Chat Bot
22. Social Media Management

Number of Users to be supported

The systems MUST have the capability to support over 10,000 internal users and a Taxpayer Base of 25 Million.

A. VENDOR EVALUATION

S/no.	**Vendor Evaluation**	**Total score**
1.	The firm must provide two (2) references where they have undertaken successful implementation of the proposed solution within the last five (5) years (from the tender closing date). The references must be in the form of signed LPOs/LSOs or contract with corresponding letter of reference/recommendation or completion certificates. Each reference provided with cited evidences (2.5 marks each) *Note: Award letters **shall not** be accepted.*	**5**
	Technical Team	
2.	**Project Manager (1)** i. Bachelor's degree in Computer Science, or Software Engineering or ICT or BBIT or any other similar or related course. (Must attach copy of certificate) -**4 marks** a. Bachelor degree –4 marks b. Diploma – 2 marks ii. The Project Manager must have certification in Project Management (PMP/ Prince2) or any other similar/related course. (Must attach copy of certificate) – **3 marks** **iii.** Must have a minimum of five (5) years' experience in Project Management (Must provide detailed and signed CV) – **3 marks** a. Above > 5 years – 3 marks b. Below< 5 years – 0 marks **iv.** Must have successfully implemented at least two (2) similar projects in developing a comprehensive Unified service platform & Omni-channel CRM Solution. (must be detailed in the CV) – **4 marks (**2 marks for each project)	**14**
	Business analysts (2) i. Bachelor's degree in Computer Science, or Software Engineering or ICT or BBIT or any other similar or related course. (Must attach copy of certificate) -**4 marks** a. Bachelor degree –4 marks b. Diploma – 2 marks	**10**

	ii. Must have minimum 5 years' experience in implementing an omni-channel CRM and Unified service portal (Must provide detailed and signed CV) a. Above > 5 years –**4 marks** b. 5 years – 3 marks iii. Must have business analysis certifications such as CBAP and other relevant certifications **(2marks)**	
3.	**Software Developer (2)** **i.** Bachelor's degree in Computer Science, or Software Engineering or ICT or any other similar or related course. (Must attach copy of certificate) -**4 marks** a. Bachelor degree –4 marks b. Diploma – 2 marks **ii.** Must have at least two (2) years' experience in extensive development experience with API technologies to aid in integration of the services. (Must provide detailed and signed CV) – **2 marks** a. Above > 2 years –2 marks b. 2 years – 1 mark iii. Must have successfully implemented at least two projects in designing and developing consumer driven API's and implementing an omni-channel CRM and Unified service portal [Must be detailed in the CV] **(4 marks)** a. Above > 2 projects –4 marks b. 2 projects – 2 marks c. Below< 2 project – 0 mark	**10**
4.	**Technical Lead (1)** i. Bachelor's degree in Computer Science, or Software Engineering or ICT or BBIT or any other similar or related course. (Must attach copy of certificate) -**2 marks** ii. Must have a minimum of five (5) years' experience in Project Management (Must provide detailed and signed CV) a. Above > 5 years – **3 marks** b. 5 years – 2 mark c. Below< 5 years – 0 marks iii. Professional Qualifications: Must have relevant CRM Platform certification depending on the selected CRM system for KRA. (**3 marks**) iv. Must have ITIL Certification for managing IT service management processes (**3 marks**) v. Must have successfully implemented at least two (2) similar projects in developing a comprehensive Unified service platform & Omni-channel CRM Solution. (must be detailed in the CV) – **4 marks** (2 marks for each project)	**15 marks**
5.	**Training Specialists (4)** i. Bachelor's degree in Computer Science, or Software Engineering or ICT or any other similar or related course. (Must attach copy of certificate) -**4 marks** a. Bachelor degree –4 marks b. Diploma – 2 marks	**11**

	ii. Experience: a. At least 3-5 years of experience in training users on CRM systems and associated functionalities. Experience in training both technical users (system administrators, developers) and end-users. **(4 marks)** b. Above > 5 years – 4 marks c. Between 3 to 5 years – 2 marks d. Below< 3 years – 0 marks iii. Professional Qualifications: Must have relevant product specific training certification depending on modules to be implemented **(3 marks)**	
Total score		**65 marks**
Cut off score is 47 marks out of 65 marks		

Bidders who shall not meet the cut off score of 47 marks for vendor evaluation shall NOT proceed to the Technical Evaluation

TECHNICAL SPECIFICATION REQUIREMENTS

Instructions to Bidders:

1. Bidders MUST complete the Table below in the format provided.
2. Bids MUST meet all mandatory (MUST) requirements in the Tables below in order to be considered for further evaluation.
3. Bidders MUST provide a substantial response or clear commitment to meeting the requirements for all features irrespective of any attached technical documents in the table format (bidders Response) below. Use of Yes, No, tick, compliant, blank spaces etc. will be considered non-responsive.
4. Bidders who do not comply with any of the below requirements will NOT be considered for further evaluation

NB: Bidders who shall meet the cut-off score for the technical and demonstration requirements shall be evaluated at the financial evaluation stage.

SECTION B: SCOPE AND IMPLEMENTATION APPROACH

No	Technical Requirements	Provided but requires customization. Bidder shall bear the cost of customization.	Provided out of the box	Bidder to explain in details how they shall achieve the items below
1.0	**Implementation Approach**			
1.1	The bidder proposal should capture the parameters below and demonstrate their understanding of the terms of reference and the structure of the Technical Proposal:			
1.1.1	Technical Approach and Methodology: Bidder to explain understanding of the objectives of the assignment as outlined in the Terms of Reference and the technical approach, and the methodology they would adopt for implementing the tasks to deliver the expected output(s).			
1.1.2	Project Workplan: Bidder to outline the plan for the implementation of the main activities or tasks of the assignment, their content and duration, phasing and dependencies, milestones and tentative delivery dates of their various components. The proposed work plan should be consistent with the technical approach and methodology, showing their understanding of the terms of reference and ability to translate them into a feasible working plan.			
1.1.3	Project Organization (Key Personnel): Bidder to describe the structure and composition of the team including the list of key experts, non-key experts and relevant technical and administrative support staff.			
2.0	Solution Hosting: Bidder to explain how they would implement a hybrid hosting solution			
3.0	**License Regime:** Bidder to state clearly the licensing regime and subscription terms of the various system components.			

4.0	**Solutions Demo:** The bidder to describe in detail the components that shall be demonstrated during the tender process. The demo should be in-depth and cover all areas within the scope of this document and any other detail that may be relevant to showcase			
5.0	Provision of 24/7 service availability and access by licensed users: Bidder to confirm provision of 99.99% Availability			
6.0	Bidder to confirm provision of adequate storage of customer interactions details: Bidder to confirm provision of a minimum of >1TB file storage per month			
7.0	Provision of 24/7 technical support for the solution: Bidder to include the solutions support framework on their proposal.			
8.0	Upgrades: Provision of regular upgrades as per business needs and technology changes: Bidder to confirm how each component shall be upgraded and indicate the frequency of such upgrades. Minimum version of N-1 required.			
9.0	Support for Enhancements and Integrations: Bidder to confirm that they shall undertake system enhancements and integrations with various internal systems such as Domestic Taxes systems, Customs Systems, ERP, and performance management systems			
10.0	System Environments Bidder to ensure provision of the following environment for each module: (a) Development (b) Test environment (c) Production Environment			
11.0	Licenses: Bidder to state clearly the licensing regime and subscription terms of the various system components.			
	Total Score			
	Cut off Score			

No	Technical Requirements	Provided but requires customization. Bidder shall bear the cost of customization.	Provided out of the box	Bidder to explain in details how they shall achieve the items below
1.0	**Unified Service Platform**			
1.1	**User Management**			
1.1.1	The unified portal Must be able to allow creation of accounts using the prescribed parameters such as email, phone number, or Single Sign On (SSO) among others.			
1.1.2	The system Must support assignment of user roles: End-User, Supervisor, Admin (configurable)			
1.1.3	The system Must allow users to update profile information (name, contacts, preferences, etc).			
1.1.4	Role Segregation: Admin, agent, and end-user roles shall have isolated privileges.			
1.2	**Service Catalog**			
1.2.1	The system should have the capability to host a centralized catalog of all services available to users on a single interface (Scrollable)			
1.2.2	The system should have the capability to Users shall be able to submit service requests via web or mobile.			
1.2.3	Issue Tracking: The system should allow users to track status of requests (Submitted → In Progress → Completed).			
1.2.3	Issue Tracking: The system should allow users to track status of requests (Submitted → In Progress → Completed).			
1.3	**Knowledge Management**			
1.3.1	The system should provide searchable knowledge articles, FAQs, guides and documents in various formats.			
1.3.2	A search: System should support AI Search capabilities and AI-driven suggestions and semantic results.			

1.3.3	Multi-media content: System should enable knowledge articles that support images, videos, embedded tools.			
1.3.4	The system must have the capability to allow Administrators to publish announcements (e.g outages, updates).			
1.4	**Integration Requirements**			
1.4.1	System must integrate with CRM, ERP and Business System (Tax & Customs).			
1.4.2	SSO: Integration with identity providers using SAML/OAuth.			
1.5	**Reports & Analytics**			
1.5.1	Dashboards: The system should allow users and managers access dashboards for tickets, SLAs, service requests.			
1.5.2	Custom Reports: The system must have customizable reports			
1.5.3	System should be able to track various KPIs: resolution time, issue volumes, satisfaction e.t.c.			
1.5.4	Personalization: The system should enable personalized dashboard: recent requests, notifications, services etc.			
1.6	**System Design & UI/UX Requirements**			
1.6.1	Responsive Design: The system must be usable on desktop, mobile web, tablet e.t.c			
1.6.2	User Interface: The system must support configuration of the Authority's brand identity e.g logo, colours, themes etc			
1.6.3	Navigation: System must support intuitive navigation with menus, breadcrumbs, search.			
1.7	**Transactional Requirements**			
1.7.1	Ability to display a single dashboard with a summary of taxpayer's tax status (both Customs and Domestic Tax)			
1.7.2	Ability to analyze taxpayer's tax status by comparing their Customs payment data vis a viz the Domestic Taxes Ledger			
1.7.3	Ability to display the taxpayers 'tax balances and provide a payment option for			

	making tax payments.			
1.7.4	Ability to display the taxpayer's correct tax balances.			
1.7	**Security Requirements**			
1.7.1	All data transmitted must be encrypted (TLS 1.2+).			
1.7.2	System should comply with the Kenya Data Protection laws.			
1.7.3	Performance: The system should be able to load primary pages in <2 seconds under normal load.			
1.7.4	Back-up and Recovery: The system should have the capability to allow daily backups, point-in-time recovery & DR failover capability.			
17.1.5	Ability to read the taxpayer's ledger balances and display it to the right taxpayers (Data Cleaning required)			
	Total Score			
	Cut off Score			

1.0 UNIFIED SERVICE PORTAL

2.0 OMNI-CHANNEL CORPORATE CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

	Corporate Customer Relationship Management System			
2.0	**Contact Management**	**Provided but requires customization. Bidder shall bear the cost of customization.**	**Provided out of the box**	**Bidder to explain in details how they shall achieve the items below**
2.1	**The bidder shall provide details of the system capability to capture taxpayers 'details as follows:**			
2.1.1	• Management of taxpayer details for a minimum of 10million taxpayers (individual & corporations scalable) Details including: -Taxpayer name -Taxpayer identifier -Address Information -Contact Details - Email, Phone, Mobile etc -Taxpayer Type (trader, student, government institutions, schools, SACCOS etc)			
2.1.2	Ability to set up and maintain data fields e.g. drop down lists, field protection etc.			
2.1.3	Ability to manage Taxpayer data to prevent duplicates e.g deduplication of emails, chats and other interactions.			
2.1.4	Ability to classify taxpayers into categories e.g. small, medium, large taxpayers, including other segments as per the Business Systems.			
2.1.5	Ability to manage multiple contacts and contact types for a			

	Taxpayer			
2.1.6	Ability to store Taxpayers preferred mode of communication			
2.1.7	The system should provide both free-text typing and structured forms when capturing issues of the Customer			
2.1.8	Ability to support automatic validation of Taxpayer fields based on predefined formats			
2.1.9	Ability to support a visual dashboard for agents & taxpayers, which will provide relevant summarized taxpayer information on one screen.			
2.1.10	Ability to create and modify individual and corporate taxpayer data			
2.1.11	Ability to search taxpayers information by using advanced search criteria			
2.1.12	Ability to set up and maintain data fields e.g. drop down lists, field protection etc.			
2.2	**Omni-Channel Management**			
	The bidder to provide detailed information on how the system support multiple channels and service options.			
2.2.1	• The solution must be able to support multiple channels of communication including voice and non-voice channels such as Whatsapp Business Platform, Social Media Platforms (LinkedIn, Instagram, Facebook, X, Youtube etc) , SMS Push/Pull, Emails, Live chat, video calls, web calls among others.			
2.2.2	• Ability to track interactions with Customers regardless of the channel that the Taxpayer uses to engage with the Authority i.e seamless interactions management			
2.2.3	• Ability of the system to support issue resolution through the use			

	of the short messaging platform and instant chat			
2.2.4	• Ability of the system to retain history of taxpayers' interactions with the Authority.			
2.2.5	• Ability to support Taxpayer satisfaction trend analysis			
2.2.6	• Ability to untether desk agents from their work stations to work from anywhere using any device such as mobile phones i.e support mobility			
2.2.7	• Ability to allow taxpayers to access services including self-service through their mobile devices and web portal.			
2.2.8	• Ability to support web surveys (per closed/resolved interaction) and campaigns e.g. targeted recurrent, multi-step.			
2.2.9	• The System should have the full management functionality of the interaction life cycle, including contact list management, interaction routing, Real-time monitoring and historical reporting, Agent monitoring.			
2.3	**Integration with the voice solution**			
	The system should have the following capabilities:			
2.3.1	Ability of the proposed CRM solution to integrate with the Contact Centre voice solution to provide immediate caller identification and information.			
2.3.1	Ability of the proposed CRM solution to interface with the Contact Centre system through the Computer Telephony Interface (CTI) to provide an incident capture and contact workspace to allow capturing additional information about a taxpayer or an incident.			
2.3.2	Ability of the proposed solution to integrate with KRA's back-end solutions such as iTax, iCMS, e-Tims			
2.4	**Campaign Management**			
	The system must have the following capabilities:			

2.4.1	• Ability to support dynamic campaigns e.g. targeted recurrent, multi-step and mass campaigns.			
2.4.2	• The campaigns should also be supported in all channels, email, SMS, voice, social media e.t.c			
2.5	**Customer Service Module**			
2.5.1	• **Unified Desktop:** The ability of the system to integrate applications to a single desktop			
2.5.2	• **Mobile Desktop:** The capability of the system to provides 24/7 access to customer portal (Anytime, Anywhere).			
2.5.3	• **Incident Management:** The capability of the system to intelligently route, queue, escalate cases/incidences			
2.6	**Omni-Channel Management**			
2.6.1	• **Multi-Channel Support:** The solution should support various channels of communication to customers including voice channels (web calls, telephone), social media, email, live- chat & digital assistant.			
2.6.2	• Ability to track interactions with Customers regardless of the channel that the Taxpayer uses to engage with the Authority.			
2.6.3	• Ability of the system to retain history of the Taxpayer interactions			
2.6.4	• Ability of the system to retain history of the Taxpayer interactions.			
2.7	**Corporate-wide Customer Interaction Management**			
	The system must have capability to manage customer interactions including service requests and Complaints management.			
2.7.1	The system should have the			

	capability that enables the Taxpayer to create or review a service request and monitor status of the same on a real-time basis.			
2.7.2	The system should enable attachment of supporting documents (in various formats including but not limited to PDF, JPEG, JPG, PNG, DOC, TXT, GIF) to service requests.			
2.7.3	The system should have the ability to keep history of interactions, archive and retrieve interactions.			
2.7.4	The system must support manual and automatic assignment of service requests to a specific users or group of users.			
2.7.5	Ability of the system to send acknowledgements to Taxpayers in their desired communication channel.			
2.7.6	Ability to assign unique ticket numbers and be part of acknowledgements sent to taxpayers upon raising a service request.			
2.7.7	Ability of the system to send notifications to taxpayers when their service request tickets have been resolved.			
2.7.8	Ability to integrate and support text, hyperlinks, audio and video communication over the web between a KRA staff and customers.			
2.7.9	Ability to search through requests raised by using advanced search criteria.			
2.7.10	Ability for customer to log in complaints and enquiries online via the web through a self-service portal, email, instant chat.			
2.7.11	Ability to support the smart assistant/virtual assistance.			
2.8	**Service Requests & Complaints Management-Agent Side**			
2.8.1	Service Requests are user needs that are lodged for resolutions. Service request should be handled in a			

	structured format and the bidder should provide detailed information on the system's capability to handle service requests.			
2.8.2	Ability to log service request tickets and assign to specific users or group of user groups.			
2.8.3	Ability for multichannel case creation call, email, web portal, instant chat, social media, WhatsApp.			
2.8.4	Ability of the system to send acknowledgements to Taxpayers in their desired communication channel.			
2.8.5	Ability to reassign service request ticket to a different user and notify them.			
2.8.6	Ability to prevent automatic assignment of service requests to users marked as out of office in the system.			
2.8.7	Ability to define Service Level Agreements (SLA's) for various types of service requests and track the SLAs.			
2.8.8	Ability to escalate a service request if the agreed SLA has been breached.			
2.8.9	Ability for system to broadcast messages to specified users through SMS or/and email as and when required.			
2.8.10	Ability to provide advanced service analytics based on defined SLAs.			
2.8.11	Ability of the system to notify users when tasks are assigned and/ or escalated to them.			
2.8.12	Provision to allow a user to respond and close or re-assign a ticket assigned to them.			
2.8.13	Ability of the system to facilitate the creation of various categories of service requests (Incident/problem / general request etc)			
2.8.14	Ability of the system and or user to assign a priority level to a service			

	request-based on set parameters			
2.8.15	Ability to revert a ticket to the initiator of the service request.			
2.8.16	Ability of the system to provide alerts that are triggered based on service rules e.g. Tax Return filing due dates			
2.8.17	Ability to provide templates and workflows for resolution of various types of issues			
2.8.18	The vendor should demonstrate capabilities of case escalation based on a pre-set escalation matrix (i.e Tier 1, Tier 2, Tier 3, Tier 4 etc)			
2.8.19	Ability to handle case reassignment when need arises e.g in case of transfers and when an agent is out of office			
2.8.20	Ability to contact the taxpayer / communicate with the Taxpayers at the different tiers - All Tiers to be able to view Taxpayers interaction history and initiate communication as required.			
2.8.21	Ability to assign a resolution or handling status to a service request (the system should have configurable resolution statuses available to all Tiers working on service requests).			
2.8.22	Ability to view the service request status across all Tiers.			
2.8.23	Allow bulk assignment and reassignment of requests.			
2.8.24	Ability to integrate with Business systems (MST, LMT & Customs) to instantly prepopulate Taxpayers bio-data during request creation, task details (e.g. Task Number, owner, status), compliance status, Obligation etc			
2.8.25	Ability of the system to link the Taxpayer request with an associated task in Business Systems (LMT, MST & Customs systems) and eTims to facilitate automatic update of the request on CRM once the task is			

	actioned.			
2.8.26	System should have a duplicate detection mechanism to ensure similar cases are identified, lumped together, resolved, and closed at a single instance across all tiers to reduce redundant workload.			
2.8.27	Ability to detect frequently requested services which will facilitate sending targeted campaigns for Taxpayer education.			
2.9	**Workflow Management**			
	The system must have comprehensive workflows for all system modules			
2.9.1	Alerts on a new task delivery.			
2.9.2	Automated assignments of tasks to a specific user or to specific queues based on predefined rules e.g. nature of the issue.			
2.9.3	Ability to define and configure routing of unique emergent requests i.e prioritize requests that meet certain thresholds.			
2.9.4	Ability to create and customize workflows to match specific business processes and requirements.			
2.9.5	Ability to route cases to specialist groups based on the nature of service request (skill based routing).			
2.9.6	Ability to untether desk agents from their work stations to work from anywhere using any device such as mobile phones i.e support mobility.			
2.10	**SLA Management**			
	The system must have the capability to map SLAs against a service request/complaint			
2.10.1	Ability to define/set/configure Service Level Agreements (SLA's) for various types of service requests and track the SLAs.			
2.10.1	Ability to escalate a service request if the agreed SLA has been breached.			

2.10.2	Ability of the system to provide alerts that are triggered based on service rules e.g. Tax Return filing due dates.			
2.10.3	Ability to monitor, apply and report on set Service Level Agreements (SLAs).			
2.10.4	Ability to map service timelines for various service lines as per the Service Level Agreements (SLAs) for various services.			
2.10.5	Ability to send service status to customers.			
2.10.6	Ability to send periodic case reminders to specific agents assigned until service requests assigned to them are resolved.			
2.10.7	Ability to send a notification to defined users if the agreed Service Level Agreements (SLAs) has been breached.			
2.11	**Single View of Customer Data**			
	Taxpayer 360 degrees' view require data from different sources (Business & Support Systems), collated, and presented in a format that is easy to understand and facilitates generation of actionable insights. **The system must have the following capabilities:**			
2.11.1	Ability to provide history of taxpayers' interactions (service requests, complaints) with the Authority with specific channels they used.			
2.11.2	Ability to support a visual dashboard for agents & taxpayers, which will provide relevant summarized taxpayer information on one screen.			
2.11.3	Ability to provide periodic tax statements to the Taxpayer – Integration with Business Systems is required.			
2.11.4	Ability to notify the Taxpayer of their tax payments/filling due dates according to their registered tax			

	obligation.			
2.12	**User Interface**			
	The system to ensure robust UI/UX design			
2.12.1	System to enable customizable user interface that allows the use of KRA's brand identity.			
2.12.2	The system must have a user interface that is simple and easy to navigate.			
2.13	**Self-Service Options**			
2.13.1	The system must support self-service requests based on a list of pre-defined services.			
2.13.2	The system should allow the requestor to create a service request based on the catalogue of services.			
2.13.3	The system should have desktop sharing facility to allow for desktop sharing (Co-browsing).			
2.14	**Knowledge Management**			
2.14.1	The system should have the capability to support a knowledge base and provide advanced search capabilities.			
2.14.2	Ability of the system to allow authorized users to write or update new knowledge into the knowledge base.			
2.14.3	The system must be capable of maintaining a collection of FAQs, videos, audio, documents in various formats e.g PDF, PNG, Jpeg e.t.c and user manuals.			
2.14.4	The system should allow the user to search for a solution in the knowledge base i.e. using key words			
2.14.5	Support integrated single knowledge base across all channels/pages.			
2.14.6	Support guided knowledge through content driver guides.			
2.14.7	The system should be able to support large amounts of data >30TB			
2.15	**Collaborative Spaces**			

2.15.1	The system should have the capability to support community forums and allow Taxpayers to interact with each other through this Forum.			
2.15.2	The system should allow moderation of this forum by authorized personnel.			
2.15.3	The system should allow assignment of roles such as Administrator, Moderator, Reviewer within the Community Forums module e.t.c			
2.16	**Self Help- AI Chat Bot Support**			
2.16.1	The system must be able to accept input from the user in form of text, numeric, audio or graphical input.			
2.16.2	The system must contain a knowledge base that contains frequently asked questions and can be updated from time to time			
2.16.3	The system must be able to return a response appropriate to the query raised by the user.			
2.16.4	The response time of returning a query should be less than 5 milliseconds.			
2.16.5	The system must be able to accept input in both Kiswahili and English languages.			
2.16.6	The system should have the capability to understand complex dialogues and identify the intent of a question to provide an accurate response.			
2.16.7	The system should have advanced conversation features and should proactively search for information and ask clarifying question including cases where the conversation is not linear.			
2.16.8	The system must be able to implement smart routing from conversations when live agent support is required.			
2.16.9	Ability of the system to provide AI powered Chabot to resolve typical			

	customer queries and AI-driven suggestions on case resolution for agents.			
2.16.10	Avail proactive Self Help dialogue/pop-up boxes to reduce error messages and/or instances of customer being unable to complete online transactions.			
2.17	**Notifications-User**			
2.17.1	Ability to notify users through email/SMS when tasks are assigned and/escalated to them.			
2.17.2	Customization: The solution can be customized and tailored as per business/service touchpoint needs.			
2.18	**File Management**			
2.18.1	System must allow downloading and uploading of files.			
2.18.2	Ability to support various files formats pdf.png.jpeg, jpg etc			
2.18.3	The system should support multimedia integration.			
2.18.4	The system should support video/audio collaboration.			
2.18.5	The system should be able to store created and/or scanned documents with an indexing and meta data to create searchable content.			
2.18.6	The system should be able to support document archiving.			
2.18.7	Capability to share files securely with key stakeholders i.e Customers and Employees			
2.18.8	**Service Analytics**			
	Ability to provide service analytics based on defined SLAs.			
	Total Score			

3.0 Integrated Marketing Solution

No.	Description	Provided but requires customization. Bidder shall bear the cost of customization.	Provided out of the box	Bidder to explain in details how they shall achieve the items below
	Campaign Management: The system must have the following capabilities:			
3.1.1	Ability to support dynamic campaigns e.g. targeted recurrent, multi-step and mass campaigns.			
3.1.2	The campaigns should also be supported in all channels, email, SMS, voice, social media e.t.c			
3.1.3	The system must have the capability to support sending of communication through various platforms (SMS, Email, WhatsApp, Live Chat etc)			
3.1.4	The system must support sending of campaigns in different formats (Text, Video, PDF, Image etc)			
3.1.5	The system must support a dynamic Campaign component where by it allows delivery of to-and-fro communication (push & pull) with the Customer under the same campaign session.			
3.1.6	The system must display pictorially the process/stage while delivering communication to the Customer under the same campaign session.			
3.1.7	The system must have capability to produce multiple push communications, in various formats (Video, Text, PDF etc), depending upon Customer response within the same session.			
3.1.8	The system must allow dynamic submission and provide flexibility to the customer to perform a certain task (Pin Registration, Return Filing, Payments etc) within the same session.			

4.0 Integrated Voice Solution

The organization seeks to implement a modern, fully integrated voice solution to support its Omni channel corporate customer support operations. The solution should provide seamless handling of all inbound and outbound customer interactions while enhancing agent productivity, operational efficiency, and service quality.

Expectations

Voice Capabilities

- A unified voice platform supporting inbound and outbound calling.
- Integrated call control features such as call answer, hold, transfer, conference, wrap-up, and termination from the agent desktop.
- Seamless integration with CRM, Queue Management, Feedback management, and other enterprise systems.

Workforce Management (WFM)

- Provides automated forecasting, scheduling, and real-time adherence tools to ensure the contact centre is optimally staffed and operating efficiently.

Quality Monitoring (QM)

- Enables call and screen recording, evaluation, and coaching workflows that improve agent performance and ensure consistent service quality.

Scope Summary

The scope covers the supply, implementation, integration, and support of a unified customer support solution that includes a modern voice platform with full CTI capabilities, an automated workforce management system for optimized staffing, and a quality monitoring suite for call and screen recording, evaluation, and coaching. The solution must seamlessly integrate with existing corporate systems, support Omni channel operations, provide real-time visibility into performance, and ensure high service availability and scalability for current and future organizational needs.

No.	Description	Provided but requires customization. Bidder shall bear the cost of customization.	Provided out of the box	Bidder to explain in details how they shall achieve the items below
3.0	**Integrated Voice Solution Functionalities**			
	Call Handling			
3.1.1	The system must have the ability to receive inbound calls from PSTN, SIP, and VoIP sources.			
3.1.2	The system must have the ability to transfer calls (blind, warm, and consultative transfer).			
3.1.3	The system must have the ability to place calls on hold with music or announcements.			
3.1.4	The system must have the ability to conduct three-way and multi-party conference calls.			
3.1.5	The system must have the ability for agents to log in and handle calls via softphone or IP phone.			
3.1.6	Outbound Calling Features • Power Dialler: automatically place outbound calls when an agent becomes available. • Predictive Dialler • Call Disposition Codes: descriptions of the final outcome of the call which are applied to the call log • Outbound Call Recording & Monitoring			

	• Call back or mass system generated calls for outbound cases			
3.2	**Automatic Call Distribution (ACD)**			
3.2.1	The system must have the ability to perform skill-based call routing.			
3.2.2	The system must have the ability to dynamically route calls based on agent availability and workload.			
3.2.3	The system must have the ability to queue calls and provide estimated wait time announcements.			
3.2.4	The system must have the ability to apply priority routing for VIP or escalated cases.			
3.2.5	The system must have the ability to route overflow calls to alternative queues or backup sites.			
3.3	**Interactive Voice Response (IVR)**			
3.3.1	The system must have the ability to configure multi-level IVR menus without code changes.			
3.3.2	The system must have the ability to integrate the IVR with backend systems (customs/tax systems etc) for self-service.			
3.3.3	The system must have the ability to support both DTMF and speech recognition input.			
3.3.4	The system must have the ability to provide callback-in-queue capability.			
3.3.5	The system must have the ability to customize prompts, languages, and announcements.			

3.4	**Call Recording & Monitoring**			
3.4.1	The system must have the ability to record all inbound and outbound calls.			
3.4.2	The system must have the ability to selectively record calls based on business rules.			
3.4.3	The system must have the ability for supervisors to barge, whisper, and monitor live calls.			
3.4.4	The system must have the ability to store, archive, and retrieve recordings based on retention policies.			
3.4.5	The system must have the ability to tag recordings with metadata (agent, queue, date, call type).			
3.4.6	The system must have the ability to record all inbound and outbound calls.			

5.0 SOCIAL MEDIA MANAGEMENT SYSTEM REQUIREMENTS

Social Media Integration

The tool should consolidate all its modules such as Listen & Analyze, Engage, Publish, Workflow & Automation, and Reports & Analytics among others under one portal for easy access to the entire product suite.

Objectives

The key objective is to provide a holistic approach to social media management for the Authority.

The system shall provide unified user interface and shall have several features including:

- Simplification of the Content Curation Process
- A rich customer engagement and support process
- Quick Enhancement of Posts with Images
- Managing Multiple Social Accounts
- Improve Real-Time Engagements
- Scheduling Posts
- Team and task management to provide oversight for users and workloads
- Tracking of all social media conversations
- Provide reporting mechanisms for various use cases

The system is expected to manage the following:

- **Centralized Management** – Manage multiple social media accounts from one dashboard.
- **Content Scheduling & Automation** – Plan and publish posts at optimal times.
- **Analytics & Reporting** – Track engagement, reach, and performance metrics.
- **Team Collaboration** – Enable multiple users to collaborate on social media campaigns.
- **Customer Engagement** – Monitor and respond to messages, mentions, and comments.
- **Integration with Other Systems** – Integrate with CRM, iTax, iCMS and other internal systems that shall be determined during the inception of the project.

Specific Objectives are as follows:

a) Increase Customer Satisfaction Index
b) Improve brand reputation
c) Improved Customer Engagement

No.	Description	Provided but requires customization. Bidder shall bear the cost of customization.	Provided out of the box	Explain/Substantiate
4.0	**Social media Management Functionalities**			
4.1	**Publish Module: The system must have the following capabilities:**			
4.1.1	Upload, preview, edit, and schedule posts to multiple social media channels including but not limited to Facebook, Twitter, Instagram, Youtube and LinkedIn from one dashboard.			
4.1.2	Attach media in various formats such as image, video, audio.			
4.1.3	Playback uploaded audio and video			
4.1.4	Add and shorten URLs.			
4.1.5	Show character limit for Twitter while typing the content.			
4.1.6	Create and export a content calendar in various formats, e.g. Excel, PDF and PPT.			
4.1.7	Create and publish polls.			
4.1.8	Attach documents in various formats i.e., image, PDF, PPT, Excel, Doc			
4.1.9	Tag accounts while publishing.			
4.1.10	Publish photos to a Facebook album.			
4.1.11	Add emoji, stickers and GIFs (where applicable)			
4.1.12	Geo-targeting tools.			
4.1.13	System to be able to map workflows such as content creator, reviewer and approver.			
4.1.14	Allow posting of a thread (Twitter)			
4.2	**Customer Engagement Module**			
	The system must have the following capabilities:			
4.2.1	Enable selection of more than one social media platform and responding to queries on any platform on the dashboard.			
4.2.2	Search for messages using usernames and key words.			

4.2.3	Filter read, unread, responded to and messages that are not responded to.			
4.2.4	Enable users to contact customers privately.			
4.2.5	Have the following message functionalities: **a)** Archive **b)** Unarchive **c)** Reply **d)** Block and Delete **e)** Unblock **f)** Like **g)** Retweet (Twitter) **h)** Copy message link **i)** Follow and unfollow **j)** Mark as read/unread **k)** Add label to specific message **l)** Hide **m)** Share			
4.2.6	Allow filtering of messages based on time. i.e., newest to oldest, oldest to newest.			
4.2.7	Allow agents to communicate and collaborate within the system.			
4.2.8	Add and delete labels in bulk.			
4.2.9	Allow users to create and save customized signatures.			
4.2.10	Ability to Quote Tweet/Retweet with a comment (Twitter).			
4.3	**User Management/Administration Functionalities**			
	The system must have the following capabilities:			
4.3.1	Allow administrators to create standard responses to frequently asked questions.			
4.3.2	Set custom permission levels. Approve workflows and user roles. Grant users access to only the profiles, permissions, and networks they need.			
4.3.3	Allow tracking of user and data activity. Administrator to be able to see the internal actions per user during a specific time period.			
4.3.4	Provision for different page roles.ie Administrator, Content creator, Moderator, Editor, Analyst.			
4.3.5	Assign tasks and social media platforms to the appropriate agents. Allow Auto and manual assignment of queries across different social media platforms.			

4.3.6	Have a log in and log out time for users			
4.3.7	Add, deactivate and revoke various user roles. Ability to deactivate users completely but retain their data for audit purposes.			
4.3.8	The measure of average response time should be configurable based on the working hours i.e shifts run from 6am to 10pm during peak seasons and 8.00am to 5.00pm during off-peak season.			
4.4	**Social Media Monitoring and Reporting**			
	The system must have the following capabilities:			
4.4.1	Create insightful, customizable reports. Draw various metrics that measure the impact of our social media content across channels and campaigns. E.g: • Growth metrics (New followers/fans, Total followers/fans, removed followers/fans, Youtube subscriptions). • Post and channel metrics such as virality, reach, impressions, engagement (mentions, shares, link clicks, video views, comments/replies). • Share of voice, Top source, top hashtag, Fans/followers demographics.			
4.4.2	Generate reports for any period and export in different formats, e.g PDF, Excel, PPT, in graphs, pie charts etc.			
4.4.3	Sentiment analysis: generate reports of mentions i.e positive, negative or neutral.			
4.4.4	Find and filter social conversations by keywords, hashtags, and locations—in multiple languages—to establish what people are saying about the KRA brand.			
4.4.5	Measure campaigns, brands and products for quantitative metrics such as conversation volume both real-time and historic including KRA brand share of voice.			
4.4.6	Identify brand mentions alongside with their respective influence over social communities. Analyse top contributors based on activity and clout score, etc.			
4.4.7	Filter the neutral mentions i.e those that do not require response vis a viz those			

	mentions/queries requiring a response. Report on the response rate should be generated based on the mentions/queries requiring a response.			
4.4.8	Measure sentiments beyond key words into contextual reading to aid in analysing sentiments.			
4.4.9	Tracking of hashtags, words or phrases over any period including real time.			
4.4.10	Post insights such as: • Best-Performing Time: The time of day and day of the week when our posts are performing the best, based on the ratio of posts to over a certain period. • Best Ratio: The ratio of posts to interaction that is the highest over a certain period. • Worst-Performing Time: The time of day and day of the week when our posts are performing the worst, based on the ratio of posts to interaction over a certain period. • Time Posted Most Frequently: The time of day and day of the week when we are posting to the most frequently. • Devices that page/account visitors used to access the content.			
4.4.11	Individual Network Reports. Utilizing a report that gives data on end user/Agent performance across the entire social ecosystem per platform. (Knowing where to invest more time and where to moderate). Proposed data for user reports. • Date and Time – Date and time of posts and replies by a user. • Name – A user's name. • Published Messages – Number of posts published by a user			

	• Replies – Number of replies made by the user • Hides – Number of posts/comments/replies hidden by the user • Deletions – Number of posts/comments deleted by the user • Archived – Number of posts/comments/replies archived by the user • Assignments Received – Number of messages assigned to the user • Assignments Completed – Number of assigned messages marked as complete • Time To Read – The average amount of time it takes a specific user to read the messages. • Specific message URL to allow for Quality Assurance.			
4.4.12	Responsiveness of the pages i.e. Response time and rate Response Time – The average amount of time it takes a specific user to respond to the message			
	Total Score			
	Cut off Score			

6.0 FEEDBACK MANAGEMENT SYSTEM REQUIREMENTS

Feedback Management Tool
Expectations

Through the deployment of the tool in customer feedback gathering, the Authority is expecting to gain the following:

a. Surveys – The tool should provide a platform to run both qualitative and quantitative SMS and email surveys using a convenient application.

b. Wider Voice of the Customer (VOC) outreach – The tool should be able to send out surveys via SMS and Emails to enable feedback collection from a wider customer base of both registered and non-registered taxpayers.

c. Introduce Agility - Obtain real time customer feedback upon completion of transactions. This information is crucial for instant subtle improvement decisions where necessary or significant changes in line with customer demands thus increases customer stickiness and ultimately customer satisfaction.

d. Increased Channel Utilization – Drive channel utilization by obtaining post process feedback for customer insights, which drive better impact measurement.

e. Experiential NPS – Provide NPS per service and obtain feedback on a real time basis. Give visibility as to what our customers are saying and presents an opportunity to take up any emerging issues as well as be responsive.

This will aid the Authority in improving customer experiences by aiming to achieve the following:

- Providing better management reports - real time NPS score: Help us to know our customers better, thus offer opportunity for improved ROI
- Enhancing customer engagement, achieve great experiences, increasing loyalty
- Real time customer feedback- Providing real time Feedback thus analysis, escalation & decision-making is quicker. This will in turn lead to faster resolution of emerging issues and or complaints
- Increase channel utilization uptake through service-based real time NPS surveys

Enhanced Customer Lifetime Value (CLV): As we understand our customer needs better, their satisfaction is enhanced leading to longer relationship span with the Authority.

Scope

a) **Service types** – The tool is expected to gather feedback from LMT & MST and Customs & Border Control (C&BC) services offered for both individuals and non- individuals.
b) **Taxpayer Geographical Distribution** – KRA customers are distributed in seven regions of the country; Nairobi, Northern, Central, Southern, Western, South Rift Valley and North Rift Valley. Moreover, customers are either residents or non- residents distributed all over the world.
c) **Service points/Channels –** KRA serves its customers at various points including; Tax Service Offices (TSOs), Contact Centre, Service Centres, Huduma Centres, and points of entry (border posts).

Deliverables

a) **Customer feedback collection tool**- provide a tool with features discussed below
b) **Training-** train our staff on how to use the tool to administer surveys

c) **Client support** – avail technical support as and when needed on call/email and provide a dedicated account manager
d) **Knowledgebase**- provide a Q&A and step by step user manual/guidelines

No.	Description	Provided but requires customization. Bidder shall bear the cost of customization.	Provided out of the box	Bidder to explain in details how they shall achieve the items below
	Feedback Management Functional Requirements			
14.1.1	Service Quality Metrics: The system should provide real time service quality metrics such as Net Promoter Score (NPS), CSAT, CES to benchmark the desired level of service quality.			
14.1.2	The system must be able to send survey to a particular segment of taxpayers following fulfillment of a particular business rule or criteria such as nil-filers, non-filers etc			
14.1.2	The system should be able to generate QR – CODE. Once the QR-CODE is scanned it should display feedback page to collect the feedback- Feedback based on the QR code.			
14.1.4	The system should be able to generate and disseminate web survey links.			

14.1.5	Ability to generate personalized email invitations with a link to a survey.			
14.1.6	The system should be able to deliver real-time survey and collect real time-time customer feedback at the point of service.			
14.1.7	The system should be able build a customer database and store customer, contact details such as email, phone number etc.			
14.1.8	The system should enable manual customer data capture or importation of the same.			
14.1.9	The system should be able to schedule bulk surveys for a particular segment of taxpayers.			
14.1.10	The system must allow role & rights assignment e.g The system admin should be able to allow survey sharing with fine control over who can view and edit.			
14.1.11	The solution should have the capability to analyse sentiments: AI enabled tool to analyse customer feedback or sentiments.			
14.1.12	SMS & Email: The system should have a feature to send bulk surveys via SMS & Email.			
14.1.13	The system must allow transaction-based triggers to survey.			
14.1.14	Automated notifications: The system should have the capability to send automated notifications to the relevant profiles triggered by customer feedback.			
14.1.15	**Survey templates** • Pre-built questionnaires to assist in survey developments • Design themes			
14.1.16	**Survey Design** • Dataset exportable to PPT, SPSS, CSV and Excel version • Survey scheduling; schedule surveys and survey reminders • Response validation options; (validate/require survey responses) • Move questions between surveys • Randomize pages			

	• Live preview • Mobile-friendly			
14.1.17	**Survey Logic Features** • Multi-conditional branching • Piping • Looping • Show/hide questions and question choices • Hide a page • Disable questions • Email triggers • Question based quotas • Advanced skip logic; conditional skipping, skip to a random page, skip to a question, skip to a page • Re-direct browser • Randomize variables • Scoring			
14.1.18	**Survey Question Types** • Drill down • Ranking questions • Radio button • Side-by-side matrix • Checkbox grid • Net Promoter Score • Date/time question • Dropdown grid • Multiple choice grid • Text response grid • Check box (multiple answer questions) • Dropdown questions • Multiple choice • File upload functionality • Timer question • Semantic differential scale • Matrix questions –multi-type question • Short text responses • Image choice • Yes/No • Text/section heading • Score/Tally Display • Add "Other" Text Box option • Checkbox Validation (x/y choices) • Make Questions Optional/Required			
14.1.19	**Publishing Features** • Secure survey with SSL			

	• Custom variables in Publish URL • Pop Up Surveys • Save and Continue Later (without cookies) • Customize Redirect URL (exit page) • Password Protect Your Surveys • The ability to create short personalized URL's for each survey • Survey Access restrictions (session, IP, Cookies) • Email invites only once per computer or once per location • Toggle Survey Between Live & Not Live • Allow Users to Print Responses • Email Notifications –(e.g. quotas reached) • Editable and personalized End Pages (Thank you, Termination etc.) • Editable and personalized Button Text • Editable and personalized Error Messages • Survey Quota Management			
14.1.20	**Data Collection** • SMS; Personalized text-message invitation • Personalized email invitations • Secure Web Links (https ://) • Social media surveys • QR codes • Create Multiple Collectors (Data segmentation) • Send Out Personalized Email invitations • Ability to embed			
14.1.21	**Invitations** • Send out secure email invite links • Personalized Email Messages • Insert Images and HTML (HTML Friendly) • Send out test emails • Send out reminder SMS • Add contacts individually • Import entire contact lists • Save contact lists			

	• View Status of SMS/Email sent (Real Time) • View status of invites • Make survey invite only • View bounced SMS/emails • Schedule message to send at a later date • Customize "From/Reply-To" Email Address and "From" Name • Merge address book fields into email invite • Create personalized fields in email invitations and merging profile information for personalized messages and invites (i.e. custom fields) • Show notifications			
14.1.22	**Analytics** • Dashboards • View tabular results in real time • View graphical results in real time • View summary statistics • View individual responses • Delete individual responses • Delete responses in bulk • Edit responses (for recoding purposes or data clean up) • Add responses • Import responses • Drop-out analytics • Daily tracking • Completion Times • The individual responses tab shows each respondent's individual answer set. • Data trends to show how response data changes over time • A question summary; shows response counts and percentages for all close-ended questions, weighted averages, open-ended comments, and dynamic charts.			
14.1.23	**Reporting** • Basic summary reports with tabulated data • Ability to generate customized top line reports (with charts,			

	graphs, summary tables, cross-tabs) • Generate Charts & Graphs (e.g. pie, bar) • Basic summary statistics (counts, frequencies, percentages) • Cross-tabulations • Basic Text Analysis			
14.1.24	**Design and Branding Control** • Custom design • Survey banner • Responsive design • Personalized Survey URL (White Label) • Access to CSS Stylesheet (if not all formatting features are available through the drag and drop interface • Redirect Respondents to a website			
14.1.25	**Actions** • Email, SMS, Twitter/Facebook; be able to send a direct message whenever a certain condition is met.			
14.1.26	**Anonymous surveys & privacy** • Anonymous surveys • White label surveys			
14.1.27	**User and role management** • Defined roles and rights of users • Show log activities			
14.2	**Feedback Management Integration requirements:**			
14.2.1	The system should have the capability to be integrated with core business systems such as SMS Gateway, iTax, iCMS, CRM etc			
14.2.2	The system should have the capability to be integrated with social media management			

	platform (Google, Facebook, Instagram and Twitter).			
15.1	**Feedback Management Reports & Analytics**			
15.1.1	• The System should have the full management functionality of the interaction life cycle, including contact list management, interaction routing, Real-time monitoring and historical reporting.			
15.1.2	• Full reporting: The system should be able to access reports on attendance, archive views and typed messages.			
15.1.3	• System should have ability to support development of graphical reports and real time status information.			
15.1.4	• Ability of the system to allow users to view historical reports to help them analyze trends, establish performance benchmarks, and plan new Customer-service campaigns			
15.1.5	• The system should have dashboard drill down capability from graphs to record level to be able to perform real time problem solving and analysis of opportunities for improvement			
15.1.6	• Customized Reports: The system should be capable of generating on demand reports (Real-time and historical reports)			
15.1.7	• Report Download: The system should enable for the export of reports and report information into the various formats: (Word, Excel, PDF, PNG, CSV etc).			

15.1.8	• Centralized Dashboard: The system should provide a centralized dashboard with NPS, daily NPS graph with Aspect ratio, Leader board with all the mapped service points' performance at a glance.			
16.1	**Integration requirements**			
16.1.1	• Ease of customization: The system should be able to integrate with the KRA website.			
16.1.2	• The system must be able to integrate with the KRA back-end systems such as iTax,iCMS,CRM,iSupport e.t.c			
16.1.3	• Ability to configure and integrate new services from both the front-end and back-end			
16.1.4	• Ability to integrate with the KRA payment gateway to enable payments through Mpesa, Banks and other authorized forms of payment.			
16.1.5	• Ability to integrate with E-citizen to enable rendering of KRA services through the E-citizen Platform.			

7.0 ELECTRONIC QUEUE MANAGEMENT & APPOINTMENT BOOKING SYSTEM REQUIREMENTS

Electronic Queue Management System

KRA should adopt the Electronic Queue Management System to enhance efficiency and customer experience. The QMS is expected to improve operational performance.

Key Features and Explanations:

1. **Accurate Waiting Time Predictions:** The system should use historical and real-time data to estimate waiting times accurately, enabling customers to plan their visits better.
2. **Customizable Settings:** The QMS allows customization to suit KRA's diverse service requirements.
3. **Predictive Analysis & Customer Journey Mapping**: By analyzing visitor flow patterns, the QMS should anticipate peak periods, identify bottlenecks, and optimize resource allocation for better service delivery.
4. **Reports and Dashboards:** Comprehensive performance insights should be available through the system, enabling managers to monitor service levels, evaluate staff performance, and implement continuous improvements.

	Queue Management System Functionalities			
No.	**Description**	**Provided but requires customization. Bidder shall bear the cost of customization.**	**Provided out of the box**	**Explain/Substantiate**
1.1	Unique token number for every ticket and every service			
1.2	Average waiting time - service wise			
1.3	No of customers ahead in the queue – service wise			
1.4	Date and time when token is printed.			
1.5	Welcome message/Promotional Information			
1.6	Must provide a feature that allows for customization of organizational assets such as the KRA logo, brand colors			

1.7	Must provide a feature that allows for the customization of branch name			
1.8	The system should enable customizable inputs by the customer before issuing the token e.g. Name, Mobile phone Number, PIN Number, Agent Number etc.			
1.9	The system should have the capability of priority ticketing based on prescribed services.			
1.10	The printed ticked should contain Service requested and Department/Unit			
1.11	The printed tickets must be perforated for ease of use by the visually impaired			
1.12	The system should have a feature to SMS token on Mobile Number			
1.13	The system should have scheduled appointment function capability			
2.	**Digital Signage (Status Display Unit)** **The system must have the following capabilities:**			
2.1	Browser-based Master Display with image and video promotions: a) with ability to display multiple contents simultaneously i.e. promotional video(s) and other relevant content			
	b) The content should be customizable. e.g. masked customer mobile number (last 5 digits visible), currently logged in user at a specific counter etc.			
2.2	Set time slots (start day and end day) for display of various content depending on the tax season and time of the day (Prime time /non-prime)			
2.4	The display should allow for text scroll messages for announcements, emergency messages etc.			
2.5	The screen should have an audio-visual means for directing / routing customers and also entertain waiting customers			

2.6	The ability to control content displayed centrally.			
2.7	The ability to displays number of Customers waiting			
2.8	The system should allow for customization of text pattern e.g. scrolling/ still text and speed of scroll			
2.9	The system should allow for customization of text font style, font size, color			
3.10	The system should be able to send alerts to the respective supervisor when the token dispenser runs out of paper or when an error is detected.			
3.	**Call Pad (Teller Station Unit) Features and Functionality**			
3.1	Multi-lingual system - Can announce the tickets calling in English and Kiswahili based on the Authority's requirement.			
3.2	The system should have the capability to send an alert when the threshold set on the total number of customer in queue is exceeded.			
3.3	The system must have a provision for inputting credentials i.e. login ID and password for every user			
3.4	The system should allow a user to transfer a ticket to another teller and assign it as a priority ticket.			
3.5	The system should allow the user to announce/call a ticket multiple times			
3.6	The system should allow the user to hold / defer call which keeps the token on hold to call it later			
3.7	The system should allow the user to skip a token if it is not appearing after multiple calls			
3.8	The system should have the ability to: Route customers to different stations for any additional services without having to restart the queuing process again.			
	The token transfer option displays the names of counters the user can transfer the token to			

3.9	Transfer can also be on priority for VIP or emergency			
3.10	The user can send a text message as remark while transferring the token for special comments			
3.11	Call pad allows the Staff to see the number of customer waiting with the waiting time of each customer			
3.12	Staff can log into the solution and be authenticated. The solution has different access roles and privileges for each type of defined user (Normal User, Administrator, Manager, etc.).			
3.13	QMS effectively keeps a log of all the activities within the system e.g. record insertions, updates and deletions with the corresponding user details, date and time of change.			
3.14	Facility to add remarks to each token. The remarks are visible to every successive operator to whom this token is forwarded. Next operator can add his own remarks			
3.15	Forward-back a token. An operator can forward-back a token to another service. On completion at forwarded service, the token is returned back to sender counter on priority			
3.16	Facility to call by Ticket Number			
3.17	The Solution should also be a feedback unit that allows a user the option to provide generic feedback or also write a comment about a particular service			
3.18	The feedback can also be based on a rating of a particular service or a customizable question e.g. "What is your opinion on the waiting area"			
3.19	The system should allow integration with SMS service for sending of customer feedback and surveys			
3.20	The system should send SMS link to collect the feedback once the token is completed			
4.	**CDU (Counter Display Unit)**			

4.1	While waiting in queue, the **CDU (Counter Display Unit)** and the Status Display Unit notifies the customer about his/her progress in the queue			
5	**Speakers/Audio announcement system (control built in amplifier and speakers)**			
5.1	Speakers - Ceiling / Wall Mount Speakers that are used to announce ticket number and counter number, which helps in directing the customers to their respective counter.			
6.	**Supervisor/ Manager Console Features and Functionality. The system should allow the Supervisor to view**			
6.1	Real-time Employee Performance Monitoring			
6.2	Real time monitoring of all the counters			
6.3	The system should allow the Supervisor to view the performance of the counters on a real time basis			
6.4	Monitor Number of customers served at each counter			
6.5	Monitor Number of customers waiting at each counter			
6.6	Monitor upcoming customers at each counter			
6.7	The system should allow the supervisor to communicate via QMS to the teller/agent and provide support and assistance as required			
6.8	Transfer queues from one counter to another counter			
6.9	The manager interface allows viewing online reports and statistics, and drilling down to see more detail and analysis.			
6.10	Management can monitor their performance through the Admin Console monitoring system.			
6.11	Automate the collection of arrival times, Service commencement times and Service end times.			

6.12	The system should allow Real Time Monitoring of the performance and utilization of the QMS Hardware			
7	**Reports**			
7.1	**Operator wise Report:** This report allows the Supervisor user to see individual staff performance. Through this report the Supervisor user can see the total tickets serviced, Average Waiting time, and Average transaction time, Max Transaction time, Max Waiting times as well as the feedback for each staff			
7.2	**Summary Report:** This report shows the daily ticket serviced with average waiting time, average transaction time with feedback			
7.3	**Transaction Report:** This report allows the user to track each token/ticket from the first counter that the customer visits to the entire subsequent counter it has been served at along with start time and end time for each counter**.**			
7.4	**Idle State Report**: Date wise idle state of each counter, In which the counter has not serviced any ticket			
7.5	**Skipped Token Report:** Date wise Skipped token Report			
	Total Score			
	Cut off Score			

8.0 GENERATIVE/AGENTIC AI BOT REQUIREMENTS

No.	Description	Provided but requires customization. Bidder shall bear the cost of customization.	Provided out of the box	Bidder to explain in details how they shall achieve the items below
	Generative AI Chat Bot Support			
10.1.1	The system must be able to accept input from the user in form of text, numeric, audio or graphical input			
10.1.2	A knowledge base that contains frequently asked questions and can be updated from time to time			
10.1.3	The system must be able to return a response appropriate to the query raised by the user			
10.1.4	The response time of returning a query should be less than 5 Milliseconds.			
10.1.5	The system must be able to accept input in both Kiswahili and English languages			
10.1.6	The system should have the capability to understand complex dialogues and identify the intent of a question to provide an accurate response.			
10.1.7	The system should have advanced conversation features and should proactively search for information and ask clarifying question including cases where the conversation is not linear.			
10.1.8	The system must be able to implement smart routing from conversations when live agent support is required.			

11.1	**Single Sign-On**			
11.1.1	Capability to provide unique logins to customers			
11.1.2	Secure access to the files/records 24/7			
11.1.3	The system must allow a single login to access all services on the portal.			
12.1	**Notifications**			
12.1.1	Automated alerts triggered whenever files are uploaded/downloaded			
12.1.2	The system should enable the Taxpayer to view product update notifications.			

DEMONSTRATION OF THE CUSTOMER SUPPORT SOLUTIONS

- Bidders who shall pass the technical evaluation shall be invited for a Demo.
- Bidders shall be required to demonstrate how the proposed solution shall meet the Authority's requirements as stipulated in table 5 below.
- The total score is 20 marks with a cut off of **15 marks** and this is a mandatory stage.

DEMONSTRATION

NO	FEATURE	EVALUATION SCENARIO	MAXIMUM SCORE	SCORE	REMARKS
1	Demonstration as per the above requirements	1. Unified Service Portal	**4**		
		2. Enterprise Omni-channel Customer Relationship Management System	**4**		
		3. Integrated Marketing Solution	**2**		
		4. Integrated Voice Solution	**2**		
		5. Social Media Management & Sentiment Analysis tool	**2**		
		6. Feedback Management Tool	**2**		
		7. Electronic Queue Management System	**2**		
		8. Generative AI Bot	**2**		
	Total Score		**20**		

Note: Demonstration will be done as per the requirements provided in this document.

OVERALL EVALUATION

SUMMARY OF THE EVALUATION SCORES

Criteria	Maximum Score / Requirement	Cut-off Score
Technical requirements/Specifications	**Mandatory**	**Met**
Vendor Evaluation	**50**	**36**
Demo	**20**	**15**
Total Points	**70**	**51**

PROJECT IMPLEMENTATION TIMELINES

Timeline/Schedule: Present a detailed timeline for the implementation with major milestones and their target dates.

The expected timelines are

18 months' implementation
1-year warranty
3 years post implementation support

D. NON FUNCTIONAL REQUIREMENTS (

No.	Feature & Minimum Specifications	Provided but requires customization. Bidder shall bear the cost of customization.	Provided out of the box	Bidder to explain in details how they shall achieve the items below
7.0	**Non-Functional Requirements**			
7.1	**Security** **Bidder to demonstrate how the following are met**			
7.1.1	Enable multi-factor authentication or one-time passwords to verify accounts and users			
7.1.2	The system must have audit logs			
7.1.3	Compliance with the Kenya Data Protection Act,2019 and E-GDPR is mandatory			
7.1 .4	Messages sent to and from the users must be encrypted to maintain privacy			
7.1.5	The system must support a back-up of chat history to enable recoverability			
7.1.6	System performance: The application must be able to send and receive			

No.	Feature & Minimum Specifications	Provided but requires customization. Bidder shall bear the cost of customization.	Provided out of the box	Bidder to explain in details how they shall achieve the items below
	messages instantly.			
7.2	**Maintenance & Support**			
7.2.1	Provision of a warranty period for one (1) year. The warranty period will kick-off once the product is successfully deployed to the production environment.			
7.2.2	Provision of support for a period of two years. The support will kick-off after the expiry of the warranty period. See more details on the SLA section.			
7.3	**Data Life Cycle Management Policy**			
7.3.1	The bidder to clearly describe in detail their data management life cycle policy			
7.4	**E. Training & Knowledge Transfer**			
7.4.1	Bidder to state in details the kind of training to be offered (On-site & Off-site) as per the training requirements in the **training section** **Click here**			
7.5	**Licensing Regime** The bidder to describe the licensing model in detail, including associated subscriptions. The appropriate licenses will be activated once the solution is in the production environment. All the requisite license and/or subscription fees to be included in the price schedule.			

PRICE SCHEDULE

SUPPLY, DELIVERY, CONFIGURATION, TRAINING, SUPPORT AND MAINTENANCE OF AN ENTERPRISE OMNI-CHANNEL CRM SOLUTION & A UNIFIED SERVICE PORTAL FOR A THREE (3) YEARS CONTRACT PERIOD
(PRICES SHOULD BE INCLUSIVE OFALL APPLICABLE TAXES)

Financial Requirement
N/B: Bidders to provide a breakdown of how they have arrived at the total cost

Grand Total Cost for this LOT to be carried Forward to the FORM FIN 2 Summary of Costs

<u>ITEM A. UNIFIED SERVICE PORTAL</u>

Table 1: Cost Breakdown

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
Implementation cost	1	Provide a One off Implementation Cost		N/A		N/A
License Cost	900	Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses
Training & Knowledge Transfer Cost	TOT – 50 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Admin Training – 50 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	End User Training – 900 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Indepth product training (Certification) - 20	Provide unit training cost				
Support & Maintenance Cost	1	N/A		Provide an annual support cost		Provide an annual support cost
Other Costs (Bidder						

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
to specify any other project related costs)						
Total:						

Note: All costs to be in Kshs and inclusive of applicable Taxes.

ITEM B. OMNI-CHANNEL CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

Table 2: Cost Breakdown

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
Implementation cost	1	Provide a One off Implementation Cost		N/A		N/A
License Cost	900	Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses
Training & Knowledge Transfer Cost	TOT – 50 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Admin Training – 50 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	End User Training – 900 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	In-depth product training (Certification) - 20	Provide unit training cost				
Support & Maintenance Cost	1	N/A		Provide an annual support cost		Provide an annual support cost
Other Costs (Bidder to specify any						

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
other project related costs)						
Total:						

Note: All costs to be in Kshs and inclusive of applicable Taxes.

ITEM C. INTEGRATED MARKETING SOLUTION – FOR TARGETED CAMPAIGNS

Table 3: Cost Breakdown

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
Implementation cost	1	Provide a One off Implementation Cost		N/A		N/A
License Cost	Campaign Database: 10 Million Contacts 100 Users	Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses
Training & Knowledge Transfer Cost	TOT – 10 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Admin Training – 10 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	End User Training – 100 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Indepth product training (Certification) - 10	Provide unit training cost		Provide unit training cost		Provide unit training cost
Support & Maintenance Cost	1	N/A		Provide an annual support cost		Provide an annual support cost
Other Costs (Bidder to specify any other project related costs)						
Total:						

Note: All costs to be in Kshs and inclusive of applicable Taxes.

ITEM D. **INTEGRATED VOICE SOLUTION WITH WORKFORCE MANAGEMENT & ADVANCE QUALITY MANAGEMENT**

Table 4: Cost Breakdown

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
Implementation cost	1	Provide a One off Implementation Cost		N/A		N/A
License Cost	300 users	Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses
Training & Knowledge Transfer Cost	TOT – 20 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Admin Training – 20 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	End User Training – 300 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Indepth product training (Certification) - 20	Provide unit training cost		Provide unit training cost		Provide unit training cost
Support & Maintenance Cost	1	N/A		Provide an annual support cost		Provide an annual support cost
Other Costs (Bidder to specify any other project related costs)						
Total:						

Note: All costs to be in Kshs and inclusive of applicable Taxes.

ITEM E. FEEDBACK MANAGEMENT

Table 5: Cost Breakdown

Item	**Qty**	**Year 1**		**Year 2**		**Year 3**
		Unit Cost	**Total Cost**	**Unit Cost**	**Total Cost**	**Unit Cost**
Implementation cost	1	Provide a One off Implementation Cost		N/A		N/A
License Cost	300 users	Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses
Training & Knowledge Transfer Cost	TOT – 20 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Admin Training – 20 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	End User Training – 300 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Indepth product training (Certification) - 20	Provide unit training cost		Provide unit training cost		Provide unit training cost
Support & Maintenance Cost	1	N/A		Provide an annual support cost		Provide an annual support cost
Other Costs (Bidder to specify any other project related costs)						
Total:						

Note: All costs to be in Kshs and inclusive of applicable Taxes.

<u>ITEM F. SOCIAL MEDIA MANAGEMENT & SENTIMENT ANALYSIS TOOL</u>

Table 6: Cost Breakdown

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
Implementation cost	1	Provide a One off Implementation Cost		N/A		N/A
License Cost	100 users	Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses
Training & Knowledge Transfer Cost	TOT – 10 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Admin Training – 10 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	End User Training – 100 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Indepth product training (Certification) - 10	Provide unit training cost		Provide unit training cost		Provide unit training cost
Support & Maintenance Cost	1	N/A		Provide an annual support cost		Provide an annual support cost
Other Costs (Bidder to specify any other project related costs)						
Total:						

Note: All costs to be in Kshs and inclusive of applicable Taxes.

ITEM G. FEEDBACK MANAGEMENT SYSTEM

Table 7: Cost Breakdown

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
Implementation cost	1	Provide a One off Implementation Cost		N/A		N/A
License Cost	100 users	Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses
Training & Knowledge Transfer Cost	TOT – 10 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Admin Training – 10 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	End User Training – 100 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Indepth product training (Certification) - 10	Provide unit training cost		Provide unit training cost		Provide unit training cost
Support & Maintenance Cost	1	N/A		Provide an annual support cost		Provide an annual support cost
Other Costs (Bidder to specify any other project related costs)						
Total:						

Note: All costs to be in Kshs and inclusive of applicable Taxes.

<u>ITEM H. ELECTRONIC QUEUE MANAGEMENT SYSTEM</u>

Table 8: Cost Breakdown

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
Implementation cost	1	Provide a One off Implementation Cost		N/A		N/A
License Cost	300 users	Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses
Training & Knowledge Transfer Cost	TOT – 20 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Admin Training – 20 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	End User Training – 300 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Indepth product training (Certification) - 10	Provide unit training cost		Provide unit training cost		Provide unit training cost
Support & Maintenance Cost	1	N/A		Provide an annual support cost		Provide an annual support cost
Other Costs (Bidder to specify any other project related costs)						
Total:						

Note: All costs to be in Kshs and inclusive of applicable Taxes.

FINANCIAL REQUIREMENT

- N/B: Bidders to provide a detailed breakdown of how they have arrived at the total cost
- Grand Total Cost –To be carried Forward to the FORM FIN 2 Summary of Costs

ITEM I. GENERATIVE/AGENTIC AI BOT

Table 9: Cost Breakdown

Item	Qty	Year 1		Year 2		Year 3
		Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost
Implementation cost	1	Provide a One off Implementation Cost		N/A		N/A
License Cost	100 users	Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses		Provide unit cost (Annual) per license – Concurrent Usage Licenses
Training & Knowledge Transfer Cost	TOT – 10 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Admin Training – 10 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	End User Training – 100 Pax	Provide unit training cost		Provide unit training cost		Provide unit training cost
	Indepth product training (Certification) - 10	Provide unit training cost		Provide unit training cost		Provide unit training cost
Support & Maintenance Cost	1	N/A		Provide an annual support cost		Provide an annual support cost
Other Costs (Bidder to specify any other project related costs)						
Total:						

Note: All costs to be in Kshs and inclusive of applicable Taxes.

ITEM J. TRAINING COST BREAKDOWN

Table 10: Training Cost Breakdown

TRAINING & KNOWLEDGE TRANSFER (5%)

Training	Requirement	No. of Users	Training Mode	No. of days - Bidder to state the no of days that the training will take.	Unit Cost
ITEM A. UNIFIED SERVICE PORTAL					
Module Training including Reports & Analytics	This is to be offered to all end users	As per the price schedule	instructor led	Not less than 5 days	
Training of Trainers (TOT)	This is knowledge transfer and training of those who will train others.	As per the price schedule	instructor led	Not less than 10 days	
End – User Training	Training offered to the end users on the system functionalities including the various modules	As per the price schedule	Instructor led	Not less than 5 days	
Administrator Training	General administration and management of the solution	As per the price schedule	Instructor led	Not less than 5 days	
Integration Training	Management and monitoring of the integration points.	As per the price schedule	Instructor led	Not less than 5 days	
Any other Product Specific Training	Product related training and certification	As per the price schedule	Instructor led	Not less than 5 days	
Product Certification	Product related certification	As per the price schedule	Instructor led (Offsite)	Not less than 10 days	
Training	**Requirement**	**No. of Users**	**Training Mode**	**No. of days -** Bidder to state the no of days that the training will take.	**Unit Cost**
ITEM B. OMNI-CHANNEL CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM					
Module	This is to be	As per the	instructor		

Training including Reports & Analytics	offered to all end users	price schedule	led		
Training of Trainers (TOT)	This is knowledge transfer and training of those who will train others.	As per the price schedule	instructor led		
End – User Training	Training offered to the end users on the system functionalities including the various modules	As per the price schedule	instructor led		
Administrator Training	General administration and management of the solution	As per the price schedule	instructor led		
Integration Training	Management and monitoring of the integration points.	As per the price schedule	instructor led		
Any other Product Specific Training	Bidder to state any product specific training	As per the price schedule	instructor led		
Product Certification	Product related training and certification	As per the price schedule	instructor led (Offsite)		
Training	**Requirement**	**No. of Users**	**Training Mode**	**No. of days -** Bidder to state the no of days that the training will take.	**Unit Cost**
ITEM C. FEEDBACK MANAGEMENT SYSTEM					
Module Training including Reports & Analytics	This is to be offered to all end users	As per the price schedule	instructor led		
Training of Trainers (TOT)	This is knowledge transfer and training of those who will train others.	As per the price schedule	instructor led		
End – User Training	Training offered to the end users on the system functionalities including the various modules	As per the price schedule	instructor led		
Administrator Training	General administration	As per the price	instructor led		

	and management of the solution	schedule			
Integration Training	Management and monitoring of the integration points.	As per the price schedule	instructor led		
Any other Product Specific Training	Bidder to state any product specific training	As per the price schedule	instructor led		
Product Certification	Product related training and certification	As per the price schedule	instructor led (Offsite)		
Training	**Requirement**	**No. of Users**	**Training Mode**	**No. of days -** Bidder to state the no of days that the training will take.	**Unit Cost**
ITEM D. QUEUE MANAGEMENT SYSTEM					
Module Training including Reports & Analytics	This is to be offered to all end users	As per the price schedule	instructor led		
Training of Trainers (TOT)	This is knowledge transfer and training of those who will train others.	As per the price schedule	instructor led		
End – User Training	Training offered to the end users on the system functionalities including the various modules	As per the price schedule	instructor led		
Administrator Training	General administration and management of the solution	As per the price schedule	instructor led		
Integration Training	Management and monitoring of the integration points.	As per the price schedule	instructor led		
Any other Product Specific Training	Bidder to state any product specific training	As per the price schedule	instructor led		
Product Certification	Product related training and certification	As per the price schedule	instructor led (Offsite)		
Training	**Requirement**	**No. of Users**	**Training Mode**	**No. of days -** Bidder to state the no of days that the training	**Unit Cost**

				will take.	
ITEM E. SOCIAL MEDIA MANAGEMENT SYSTEM					
Module Training including Reports & Analytics	This is to be offered to all end users	As per the price schedule	instructor led		
Training of Trainers (TOT)	This is knowledge transfer and training of those who will train others.	As per the price schedule	instructor led		
End – User Training	Training offered to the end users on the system functionalities including the various modules	As per the price schedule	instructor led		
Administrator Training	General administration and management of the solution	As per the price schedule	instructor led		
Integration Training	Management and monitoring of the integration points.	As per the price schedule	instructor led		
Any other Product Specific Training	Bidder to state any product specific training	As per the price schedule	instructor led		
Product Certification	Product related training and certification	As per the price schedule	instructor led (Offsite)		
Training	**Requirement**	100	**Training Mode**	**No. of days -** Bidder to state the no of days that the training will take.	**Unit Cost**
ITEM F. INTEGRATED VOICE SOLUTION WITH WORKFORCE MANAGEMENT & ADVANCED QUALITY MANAGEMENT					
Module Training including Reports & Analytics	This is to be offered to all end users	As per the price schedule	instructor led		
Training of Trainers (TOT)	This is knowledge transfer and training of those who will train others.	As per the price schedule	instructor led		
End – User Training	Training offered to the end users on the system	As per the price schedule	instructor led		

	functionalities including the various modules				
Administrator Training	General administration and management of the solution	As per the price schedule	instructor led		
Integration Training	Management and monitoring of the integration points.	As per the price schedule	instructor led		
Any other Product Specific Training	Bidder to state any product specific training	As per the price schedule	instructor led		
Product Certification	Product related training and certification	As per the price schedule	instructor led (Offsite)		
Training	**Requirement**	100	**Training Mode**	**No. of days -** Bidder to state the no of days that the training will take.	**Unit Cost**
ITEM G. GENERATIVE AI BOT					
Module Training including Reports & Analytics	This is to be offered to all end users	As per the price schedule	instructor led		
Training of Trainers (TOT)	This is knowledge transfer and training of those who will train others.	As per the price schedule	instructor led		
End – User Training	Training offered to the end users on the system functionalities including the various modules	As per the price schedule	instructor led		
Administrator Training	General administration and management of the solution	As per the price schedule	instructor led		
Integration Training	Management and monitoring of the integration points.	As per the price schedule	instructor led		
Any other Product Specific Training	Bidder to state any product specific training	As per the price schedule	instructor led		
Product Certification	Product related training and certification	As per the price schedule	instructor led (Offsite)		

PRICE-SCHEDULE SUMMARY COST

Table 10 Price Schedule Summary

Financial Summary Cost	Total Unit Cost (VAT Inclusive) in KES
Total Unit Cost for Item A	
Total Unit Cost for Item B	
Total Unit Cost for Item C	
Total Unit Cost for Item D	
Total Unit Cost for Item E	
Total Unit Cost for Item F	
Total Unit Cost for Item G	
Total Unit Cost for Item H	
Total Unit Cost for Item I	
Grand Total Cost –To be carried Forward to the FORM FIN 2 Summary of Costs	