

**Annexure III: Pre-Bid Query Format**

S.No	Section & Page No.	Clause Requiring Clarification	Clarification Requested/Sought	PFRDA's Response
1	Page - 7	Language Support	Could you kindly provide the volume split across languages to be considered for each channel and LOB? Additionally, we will need the distribution of language-specific volumes for both Inbound (IN) and Outbound (OB) Calls, as well as Emails (if applicable).	Considering the inbound and outbound calling (inclusive of the SMSs), approximately 50,000 to 60,000 calls per month are being handled by the existing service provider and approximately 70 percent of these calls are being dealt in English and Hindi languages. Rest of the calls are in regional languages.
2	Page - 16	SLA Requirement	While the AHT targets of 5 and 6 minutes have been provided, we understand that AHT may vary across channels. Could you please share the targeted AHT for each channel in scope, such as Inbound Calls, outbound calls, Email etc., at the LOB level? Additionally, for Outbound Calls, could you kindly provide the AHT breakdown, distinguishing between Right Party Connect AHT and Non-Right Party Connect AHT?	Based on our experience the AHT for inbound and outbound calling is in the range of 5 minutes.
3	Page - 16	SLA Requirement	Kindly share the turnaround time (TAT) for Email, SMS & any other non-live channel in-scope.	As per the standard practices followed in the call centre/ help desk industry.
4	Page - 16	SLA Requirement	Kindly share Service level for Inbound Calls & any other live channel in-scope. Turnaround Time/SLA for Email?	As per the standard practices followed in the call centre/ help desk industry.
5	Page - 16	SLA Requirement	At what level is that SL/ASA and abandon target is required to be achieved i.e., daily, weekly or monthly?	ASA should be as minimum as possible.
6	Page - 8	Channel Support	For Outbound Calls, kindly share the connect % bifurcated into Right Party Connect% and Non-Right Party Connect% at LOB level.	No specific information available as the volume and size vary during different time periods.

7	Page - 8	Channel Support	Could you please confirm whether an Outbound call connected to a non-right party should be re-attempted until the right party is reached or not be re-attempted at all? Additionally, for Outbound Calls, kindly provide information on the maximum number of attempts allowed for a non-connected outbound call. Furthermore, it would be helpful to have the attempt-wise connect percentages, such as attempt 1 - 40%, attempt 2 - 30%, etc.	There should be at least three attempts made in case of the outbound calls connected to the non-right party.
8	Page - 8	Channel Support	Could you please confirm the preferred method for making Outbound Calls? Specifically, if Outbound Calls are to be made using a dialer, we would like to know whether it is predictive or preview dialing. In the case of Outbound Calls made via manual dialing or preview dialer, could you kindly provide the non-connect AHT to be considered, for example, 30 seconds, 45 seconds, etc.?	The preferred method would be latest technology - predictive or preview dialing.  Outbound Calls made via manual dialing or preview dialer, should preferably have the non-connect AHT as 45 seconds.
9	Page - 8	Channel Support	Is there a scope of multiskilling between LOBs or Channels in-scope?	The same shall be decided by the service provider keeping in mind the parameters laid down in the SLA.
10	NA		Kindly share 4 - 6 weeks of daily volume to assess the day of the week volume factor for sizing purpose of Inbound Calls, outbound calls, Email etc. at LOB level. Alternatively, please share day of the week volume factor for each channel in-scope at LOB level. E.g. - Mon-15%, Tue-16% & so on.	
11		WFM General Questions	Kindly share 4 - 6 weeks of interval wise volume offered to assess the intraday arrival pattern for sizing	

			purpose of Inbound Calls, outbound calls, Email etc. at LOB level. Alternatively, please share intraday volume pattern for each channel in-scope at LOB level. E.g. - 09:00 - 1%, 09:30 - 1.5% & so on.	No specific information available as the volume and size vary during the week and the months
12	NA		How many touches are expected per transaction of Inbound Calls, outbound calls, Email etc. and any other non-live channel in-scope. For multiple touches, please clarify if the AHT shared is inclusive all required touches, if not then, please share the AHT i.e. inclusive of all touches.	
13			Do SMS, Email, and any other non-live channels also require a maker and checker process? If so, could you please provide the maker and checker APT/AHT for each query type?	
14			Kindly share weekly or the monthly offered volumes to be considered for sizing of each channel in-scope e.g. Inbound Calls, Outbound, Email, SMS etc. at LOB level.	
15	Page -7, Sec - 3.3	Channels Support	What is the total billable FTE count LOB/Activity wise	As per the terms and conditions laid down in the RFP
16	Page - 14, Sec- 3.11	The Schedule for implementation of the Project - point# 6	The provided information indicates a training duration of 15 days. However, as there is currently no training content available, we seek validation of this duration. We kindly request to confirm the detailed breakup of the total number of days required for Process training, On-the-Job Training (OJT), Certification, and Go-live for each LOB.	We conduct suitable training session for the call center executives before the Agency GO-LIVE in the market. In addition to this there would be multiple refresher training sessions conducted at regular intervals.
17	Page - 10, Sec - 3.11	Knowledge Management - The service provider will develop training	Could you please confirm whether the PFRDA will conduct training and certification for the first batch,	PFRDA would be providing product specific (No certifications) to the executives and the supervisors

		methodology including training material in English, Hindi, and other Indian languages for imparting knowledge to the Executives in consultation with PFRDA	incorporating the Train the Trainer (TTT) process, where one Third-Party (TP) Trainer will be trained alongside agents in the initial batch? Additionally, will there be any system-based training provided for the employees hired for the project?	before the Service provider GO-LIVE in the market. In addition to this there would be multiple refresher training sessions conducted at regular intervals.
18	Page - 24, Sec -B	Approach and Methodology	We seek clarification on the quality assessment methodology and parameters applicable to all LOBs.	As per the terms and conditions laid down in the RFP
19			Are there any specific hardware standards that need to be followed for LAN and WAN equipment?	As per the latest industry standard.
20	NA	Transition General Questions	Is there a requirement for CTI Integration? If yes, kindly provide the Disposition eList, which will be incorporated during the CTI Integration process.	As per the latest industry standard.
21	Page - 14, Sec -3.14.14	Operational Requirements	The IVR recordings and IVR flow/tree are expected to be shared by PFRDA, as the Service Provider does not perform IVR recording. The Service Provider will solely implement the recordings provided by PFRDA.	No, The IVR recordings and IVR flow/tree are required to be submitted by the service provider. The necessary information for the recordings would be provided by the PFRDA through mutual discussion
22			What would be the sampling target for Call Quality audits	As per the latest industry standards.
23			Please share the Quality Evaluation sheet/Quality SOP	The successful bidder has to submit the quality evolution sheet for confirmation to the PFRDA
24	NA	Quality General Questions	Please share the baseline targets for first 3 months	Kindly refer the parameters as laid down in the SLA.
25	Page -8	The database available with the existing Information Help Desk, database provided by PFRDA or on its behalf by other intermediaries shall be utilized for making outbound calls and sending SMSs/emails. The Service	A) As per the RFP clause, the database will be provided by PFRDA or other intermediaries. Could you please confirm how access to the database/calling data will be facilitated, specifically through which medium, such as the Internet?	The data required for the purpose would be excel formats and confidentiality of which shall be maintained by the service provider

		<p>Provider would also route calls to intermediary's registered with PFRDA viz. Pop, CRA, Trustee Bank, Pension Funds, Annuity Service Providers etc. as per subscriber/caller needs.</p>	<p>B) Will the data transfer process be manual or automated? Please provide confirmation.</p> <p>C) Kindly confirm the mode of data transfer; will it be via email or SFTP? If SFTP is the chosen method, will PFRDA provide access to an SFTP, or does the Third Party need to make provisions for the SFTP?</p>	
26	Page -11, Sec - 3.13.1	<p>The Information Help Desk would receive the queries of citizens through toll-free number/SMS/Email. PFRDA shall bear the call charges of the toll-free numbers and the outgoing telephone numbers, for making outbound calls or to route calls to other stakeholders/intermediaries of the NPS like the CRA call center. The system should have the capability of Call Holding and Call Routing facilities and the Executives would also be required to call the prospects/callers/subscribers to provide information on NPS/APY.</p>	<p>Service Provider assuming Toll-free will be provided by PFRDA, where incoming call will be forwarded on Service Provider provided DID number? Please confirm</p>	Yes
27	Page -11, Sec - 3.13.1	<p>The Information Help Desk would receive the queries of citizens through toll-free number/SMS/Email. PFRDA shall bear the call charges of the toll-free numbers and the outgoing telephone numbers, for making outbound calls or to route calls to other stakeholders/intermediaries</p>	<p>To facilitate the routing of calls to other stakeholders/intermediaries of the NPS (CRA call center), is it expected that these stakeholders/CRA call centers will provide their PRI/DID numbers? Additionally, could you please confirm whether the service provider will manually route the calls from the agent's machine? If so, kindly share</p>	<p>The system should have the capability of call routing facilities.</p>

		of the NPS like the CRA call center. The system should have the capability of Call Holding and Call Routing facilities and the Executives would also be required to call the prospects/callers/subscribers to provide information on NPS/APY.	the list of stakeholders along with their respective numbers where transfers are required.	
28	Page -13, Sec - 3.14.3	The Service Provider shall have sufficient numbers of incoming lines with a facility to install an additional 20 lines.	We are assuming that one PRI (30 channels) will be sufficient to run this business. Could you please confirm this assumption? Additionally, kindly confirm the total requirement of PRI lines for both inbound and outbound operations.	Yes, and as per the industry practice.
29	Page -12, Sec - 3.14.4	The Executives would also be required to refer to some relevant websites maintained by Central/ State Government agencies/PFRDA as well as other popular and reliable websites to answer some of the queries like market information and other related queries etc. from the citizens. The Executive must therefore have online access to these sites over the Internet.	A) Please confirm if all required/relevant websites will be access over the open internet? B) Please share per user required bandwidth?	Yes, and as per normal bandwidth.
30	Page -12, Sec- 3.13.10	A dedicated e-mail ID is to be created for handling routine queries of prospective as well as existing subscribers. Standard reply, offer document, forms etc. to be sent to the prospective subscriber mail ID within 48 hours.	We are assuming Email platform will be extended by PFRDA? Please confirm	Yes

31	Page -13, Sec- 3.14.10	The Information Help Desk system shall have an Automatic Call Distribution feature based on Idleness, and capacity utilization of each Executive and Automated call reference number generation and call recording.	A) Please share require call recording retention period. B) Is there any requirement of screen recording? If yes, pls share screen recording retention period? C) We are assuming SFTP will be provided by PFRDA to transferred voice & screen call recording, please confirm	As per terms and conditions laid down in the RFP.
32	NA	IT General Question	Please provide the list of applications that need to be integrated with the Dialer	Shall be as per industry norms and best practices. Also, in full compliance with RFP terms and guidelines
33			Please share the complete IVR flow with integration touch points	
34			Please share daily, monthly Inbound & outbound call volume forecast to understand requirement of OB & IB PRI lines	
35			Are there specific hardware requirements for endpoints? Additionally, is there any need to consider dual monitors or specific size requirements?	
36			Service Provider proposed solution will be on VDI (Citrix) with Thin Clients as endpoints. Please confirm, if any of the in scope PFRDA applications have any compliance issue while accessing through VDI or thin clients?	
37			Are there any specific compliance requirements that need to be considered such as ISO 27001, PCI, GDPR, etc.? Please confirm	
38	Page -15	Implementation schedule	The RFP states that GO LIVE is to be achieved at T+20 days, is there any relaxation that can be provided since the telephony set up along with the integration, IVR etc. might take a min of 4 to 6 weeks	As per terms and conditions laid down in the RFP

39	Page -7	Point 3.3	We assume Service provider would require providing multi-channel CRM platform for storing, tracking, managing and reporting callers/subscriber queries and complaints with channel supports for inbound call, outbound call, Email and SMS notification only, please confirm	Single or multi -channel CRM may be decided by the Service Provider.
40	Page -7	Point 3.3	Could you please elaborate or confirm the process for validating existing subscriber details upon call arrival or for other interaction channels? Will there be a regular sharing of subscribers/customer dump with us? If not, is there any access provided by PFRDA to obtain the required details?	As per the industry norms and best practices.
41	Page -7	Point 3.3	Data for outbound campaigns will be provided by the PFRDA via 1. Data Files 2. System integration with Bank applications 3. Both	The data required for the purpose would be excel formats and confidentiality of which shall be maintained by the service provider
42	Page -9	Point 3.9	It is assumed here that PFRDA will provide list and detailed specification for reports to be provided. Please confirm that all reports will be generated at the contact center and shared with PFRDA OR PFRDA desires to have a web interface for generating and downloading of reports which will be accessed outside the content center.	The successful bidder will be provided the necessary format of the reports to be submitted on weekly/fortnightly/monthly basis.
43	Page -14	Point 3.14.14	It is our understanding that the SMS Gateway and related services are expected to be provided by the Service Provider.	Yes
44	Page -10	Point 3.11	It is our understanding that KMT (Knowledge Management Tool) is to	Yes



			be provided by the Service Provider and it will be used only within the contact center. We assume here that PFRDA will provide required contents in editable format for updating the application	
45	Page -12	Point 3.13.10	For email Services it is assumed here that PFRDA will provide the necessary email accounts, credentials, and SMTP server access.	Email ID will be provided.
46	NA	IT General Question	Is there any integration required with PFRDA existing system or other sub systems with Service provider CRM? If yes, please specify the mode of communication required for integration. If yes, Please provide the integration points with the applications and other peripheral systems which Client has and needs us to integrate with. For integration, type of support/ documentation and APIs provided for the existing software? Front end and back end of client systems and supporting technology for integration.	As per the terms and conditions of the RFP.
47	NA	Legal General Question	We understand that a draft Agreement will be provided at the time of award of services and service provider reserves its right to share its view and negotiate such draft when provided.	Standard form agreement shall be provided by the PFRDA which needs to signed by both the parties.
48	Page - 8, Sec- 3.3	Outbound services include calling prospective and existing subscribers providing information about schemes, and processes, answering emails and sending SMS/emails to	We understand that PFRDA will provide consented database to enable us to perform the Services. Accordingly, service provider will not be scrubbing the database against the DNC list issued by TRAI and PFRDA to be liable for any claims	PFRDA will be providing the aggregated data and the required consent etc has to be checked by the service provider.

		<p>subscribers about scheme details, processes, forms, location details of Pop/Pop-SP etc.</p> <p>The database available with the existing Information Help Desk, database provided by PFRDA or on its behalf by other intermediaries shall be utilized for making outbound calls and sending SMSs/emails.</p>	received by service provider because of the same.	
49	Page - 8, Sec - 3.5	PFRDA would provide the Service Provider with a 2-month notice period to allow the Service Provider to scale up its operations to support extended hours of operation.	We understand that the same 2-month notice period shall be provided by PFRDA for any similar scale down of operations.	As per terms and conditions laid down in the RFP.
50	Page - 9, Sec - 3.8	All the data collected and stored by the Service Provider while undertaking the functions of the Information Help Desk will be the property of PFRDA.	PFRDA to please note that all IP and data which is owned by service provider shall continue to be its own property. Any IP/Data created exclusively for PFRDA by service provider at the sole cost and behest of PFRDA shall be transferred to PFRDA. Any IP/Data which is owned by service provider and is used to create the IP/Data for PFRDA shall remain property of service provider.	As per terms and conditions laid down in the RFP.
51	Page -10, Sec - 3.10	The minimum capacity to handle calls per day should be 1600 calls at an average handling time of 6 minutes per call.	Any call volume more than the 1600 calls average to be charged extra. Service provider shall raise a minimum invoice basis 1600 calls average in case the volume reduces.	Strictly as per the terms and conditions laid down in the RFP
52	Page - 15, Sec - 4.2	For each day of delay in achieving the milestones (indicated as * in the above table), PFRDA shall be entitled for a compensation of	We propose to cap total delay penalty at a maximum of 2% of the monthly invoice value or Rs. 10000 whichever is lesser. In case if the delay is not cured by Service Provider within 30	As per terms and conditions laid down in the RFP.

		Rs 1000 (one thousand rupees). If the final Go-Live is delayed beyond 2 weeks, or any particular milestone is delayed beyond one week, then PFRDA may subject the contract for termination and will also reserve the right to invoke the entire contract amount deposited in the form of Performance Bank Guarantee or such other action as deemed fit.	days, then PFRDA can terminate the contract by providing another 30 days advance notice.	
53	Page - 16, Sec 4.3	The payment to the Service Provider quarterly would be linked to compliance with the SLA metrics as laid down in the table below.	We propose that all undisputed monthly invoices shall be paid by PFRDA within 30 days of receipt of invoice.	As per terms and conditions laid down in the RFP.
54	Page - 17, Sec- 4.5	PFRDA will be entitled for a compensation of Rs. 5,000 if the total Service Level Score is less than or equal to 80 in any month. If the performance is less than or equal to 80 for three months in a row or PFRDA has sought compensation from the Service Provider three months in a row, then PFRDA may take necessary steps to terminate the contract on the basis of non-performance in the subsequent month of non-performance.	We propose that PFRDA shall inform the Service Provider of such less score and provide 30 days' notice for Service Provider to cure the defect. In case the Service Provider fails to cure the defect and the defect continues for 3 consecutive months, then PFRDA shall terminate the agreement by giving an advance notice of 30 days to Service Provider and pay all undisputed invoices before that last date of termination.	As per terms and conditions laid down in the RFP.
55	Page- 17, Sec - 4.5	PFRDA may assign the audit of the performance of the service provider to any of its authorized representatives and the Information Helpdesk service provider shall fully	We propose to add that PFRDA shall provide an advance notice of minimum 5 business days before conducting any such audit and only premises, material, books, records, documents, etc. related to provision	As per terms and conditions laid down in the RFP.

		cooperate in and facilitate such audit.	of Services exclusively for PFRDA shall be allowed to be audited.	
56	Page- 26, Sec - 8.1	PFRDA may award the Contract to the successful bidder for a period of 3 years from the date of signing of the contract, which may be extended at the instance of PFRDA for another period of two years at its sole discretion on the same terms and conditions.	We propose that any extension after 3-year term to be mutual agreed and in case if Service Provider wishes not to continue with the contract for any reasons whatsoever, then Service provider shall provide a 90 days' notice before the end of the 3-year term for non-renewal and the contract shall stand terminated at the end of the initial 3-year term.	As per terms and conditions laid down in the RFP.
57	Page- 26, Sec - 8.3	Once PFRDA notifies the successful bidder that its proposal has been accepted, the successful Bidder shall be required to accept the offer, furnish the required Performance Guarantee and enter into a contract with PFRDA within 21 (twenty-one) days from the date of receipt of notification of award of the contract, upon the terms and conditions mentioned therein and based on this RFP.	We propose that the maximum time allowed to enter a contract shall be 90 days after award of services considering the scope of work and usual contract lifecycle management procedures.	As per terms and conditions laid down in the RFP.
58	Page- 27, Sec - 8.4	In the event of the bidder being unable to service the contract for whatever reason, or breaches the terms and conditions of the contract/RFP, PFRDA shall be entitled to invoke the PG.	We propose that notwithstanding anything contained in this RFP or the contract, the maximum penalties that can be adjusted by invoking the Performance Bank Guarantee shall be not more than 5% of the total Performance Bank Guarantee.	As per terms and conditions laid down in the RFP.
59	Page- 28, Sec - 8.7	Payment of Compensation for Non-compliance to the Service-Level Requirements	We propose to modify the clause as per Serial No. 7 & 8 hereinabove.	As per terms and conditions laid down in the RFP.
60	Page- 28, Sec - 8.8	Termination of Contract	We propose to increase the notice period for termination in case of default from 30 days to 90 days. We	As per terms and conditions laid down in the RFP.

			also propose that Service Provider shall have the right to terminate the contract by giving 90 days' notice for any reasons whatsoever, and by giving 15 days' notice in case of delay in payment by PFRDA for a due and undisputed invoice.	
61	Page- 29, Sec - 8.11	The Information Helpdesk Service Provider shall maintain utmost confidentiality and shall not disclose/part with any deliverables created for the purpose of this agreement/ information received by it from PFRDA to any third party either for commercial or for any other purpose and shall maintain strict confidentiality with respect to such information, as may be specified in the contract with PFRDA, failing which it shall be held liable.	We propose to make this clause as mutual obligation of both the parties to keep all confidential data as confidential. Further, we propose that this confidentiality obligation shall survive up till 2 years after the expiry or termination of the contract.	As per terms and conditions laid down in the RFP.
62	General	Training	Is there a defined trainer ratio for the program? Will the trainer be billed to the client?	The requisite trainings will be provided by PFRDA.
63	Pre-Qualification/Minimum Eligibility Criteria Page No 6, Point No. 5	The average turnover from call centre-related business shall not be less than Rs 50 crores in the last three financial years (FY 2020-21 to 2022-23)	Requested to amend this clause as "The average turnover from call centre-related business shall not be less than Rs 40 crores in the last three financial years (FY 2020-21 to 2022-23)"	As per terms and conditions laid down in the RFP.
64	Evaluation of Bid/ Proposal Page No. 23 S.No.2 of table Past Experience in related areas	Average turnover from domestic call centre related business during last 3 financial years  Rs 50crs ≤ Rs. 75crs :5	Average turnover from domestic call center related business during last 3 financial years  Rs 40crs ≤ Rs. 45crs :3 Above Rs 45crs ≤ Rs 50 crs: 5 Above Rs. 50 crs: 10	As per terms and conditions laid down in the RFP.

		Above Rs 75crs ≤ Rs 100 crs: 7 Above Rs. 100 crs: 10		
65	Table Point No. 5 of Pre-Qualification / Minimum Eligibility Criteria	The average turnover from call centre-related business shall not be less than Rs 50 crores in the last three financial years (FY 2020-21 to 2022-23) CA certificate mentioning turnover from call centre activities for each of the last 03 Financial Years (FY 2020-21 to 2022-23) should be submitted	Since the contract value is INR 1,22,00,000/- as per CVC Guidelines Office Memorandum No. 12-02-1-CTE-6, Dated 17-12-2002, the department can ask average annual turnover at least 30% of estimated cost, we would request your consideration to review the turnover criteria for upto 5 crores so the other reputed organization would be able to participate in the tendering process.  We would also request you to please review the pre- qualification criteria and technical evaluation from the previous tender with the similar requirement and estimated cost.	As per terms and conditions laid down in the RFP.
66	Table Point No. 1 of 6. Evaluation of Bid/Proposal	Number of years of experience as an entity providing Business Process Outsourcing/ Call Center/Contact Center/ITeS related services in India as on the date of application 5 yrs ≤ 7 yrs: 5 Above 7 yrs ≤ 10 yrs: 7 Above 10 yrs: 10	We would request you to please reframe this point upto maximum 5 years, this will help reputed startups to not only participate in this tender furthermore to more chances to Win.  We would also request you to please review the pre- qualification criteria and technical evaluation from the previous tender with the similar requirement and estimated cost.	As per terms and conditions laid down in the RFP
67	Table Point No. 5 of 6. Evaluation of Bid/Proposal	Number of call centre seats in a single location in India 200 and up to 300: 5 between 301 – 700 (including end points): 7 Above 700: 10	To allow fair and equal participation of all interested bidder, MSEs and Startups we would request you to please reframe this clause by upto 100 Seats for a single location.  We would also request you to please	As per terms and conditions laid down in the RFP.

			review the pre- qualification criteria and technical evaluation from the previous tender with the similar requirement and estimated cost.	
68	General	General	Please help us knowing under which category the bidder shall pay minimum wages (Un Skilled, Semi-Skilled, Skilled)?	As per the applicable laws
69	3.14 Operational Requirements Page no:- 12	3.14.1 There would be a distinctly separate unit/ enclosure for the Information Help Desk in the general Call Center of the Service Provider.	Please specify, Number of seats, Infra, Access control, CCTV system etc	As per the requirement of manpower mentioned in the RFP
70	B. Eligibility Criteria (Page no 36)	Details of security level implemented (Physical Security, Network Security, Data Security, Industry Security Certifications)	For Physical Security, what type of details & documents are required for submission	As per the Industry standards
71	3.8 Common Customer Relationship Management (CRM) Platform	The Service Provider shall provide their own multi-channel CRM platform for storing, tracking, managing and reporting callers/subscriber queries and complaints	We assume that bidder can propose cloud based in house developed CRM on Saas model. Please confirm	Yes
72	3.8 Common Customer Relationship Management (CRM) Platform	General	Please confirm the number of users for CRM	At present, in PFRDA, 4-5 but scalability should be possible.
73	3.8 Common Customer Relationship Management (CRM) Platform	All queries/calls/SMS/email received and outbound calls made at the Information Help Desk will have to be recorded in the CRM application and stored for future reference and audit.	We assume that PFRDA will provide SMS and Email gateway and bidder has to integrate with the same	No
74	3.8 Common Customer Relationship	General	Please confirm the list of existing system of PFRDA to be integrated with CRM	Will be integrated depending upon the requirements.

	Management (CRM) Platform			
75	3.8 Common Customer Relationship Management (CRM) Platform	General	Is there any scope for data migration from existing system?	All the data collected and stored by the Service Provider while undertaking the functions of the Information Help Desk will be the property of PFRDA
76	3.11 Knowledge Management	The Service Provider shall assist PFRDA in setting up a framework and associated processes, and workflows for handling common types of queries	1. is it expected to develop and implement knowledge Management system?	Yes
77	6. Evaluation of Bid/Proposal -	Knowledge Management	Kindly elaborate on the requirement of board approved policy. Please confirm whether Knowledge management process followed by vendor can be shared to attain full marks	Yes, the approved policy and process can be shared.
78	3.14.4 Operational Requirements	Service Provider must provide 15 days' exhaustive training before deployment of executives on the floor. The training period will not count for billing purposes.	We request to consider training period as billable for certified resources & also request to share required Training modules	Initial training will be part of pre-Go-live.
79	Page # 8, 3.3 Channels Support:	In-Bound Channels Supports (i) Voice (Telephone) (ii) Email (iii) SMS Out-Bound Channels supported (i) Voice (Telephone) (ii) Email (iii) SMS	* Same set of agents expected to handle Inbound, make out call and respond to emails, please confirm? * In case no, what would be LOB wise manpower bifurcation? Please share LOB and language wise headcount split.	The same set of agents may handle the inbound and outbound callings. The Service Provider can take requisite decision based on the volume of inbound and outbound calls.
80	Page # 10, 3.10 Manpower requirements	The Service Provider shall provide the minimum capacity to handle 160-man hours on all working days. The minimum capacity to handle calls per day should	* The requirement of 160 hours and / or 1600 calls at AHT of 6 mins may not be feasible during 8 hours of operational window [09.30 am - 05.30 pm] with 20 resources, as the agents would have to be given breaks for	This is as per the current service being received by the PFRDA. Few extra resources are used to ensure availability of 20 resources.



		be 1600 calls at an average handling time of 6 minutes per call.	meals, etc, request to reconfirm on billable resource count?	
81	Page # 16, 4.4 Information Help Desk Service Level Requirements & Measurements	Capacity Utilization - Utilization > 84 calls	* Utilization shall depend on actual call received and out call made, same can be baselined during beta period, please confirm? * This should also include the number of emails handled and responded, please confirm?	Emails are separate.
82	Page # 16, 4.4 Information Help Desk Service Level Requirements & Measurements		* What is the existing SLA/KPI achievement trend? Please share the details for last 6 months.	Existing service provider has ensured compliance.
83	General	General	For Email - * What is the daily / monthly email transactions to be handled? * What is the AHT [including outcalling, if any]? * What is the Email Distribution Pattern Half Hourly Interval and day wise? Please share last 3 months trend (in numbers).	This may vary depending on the volume of emails received.
84	General	General	Language requirement for Emails shall be English only, is the understanding correct?	Yes
85	General	General	Beta period shall be 90 days from the go-live date? Please confirm.	Kindly refer schedule for implementation of project in RFP
86	clause 8.6, Pg. 27	Terms of Payment to the Selected Information Helpdesk Service Provider a) Advance payment will not be considered. b) The charges quoted in the commercial proposal by the successful bidder would be settled/paid by PFRDA on a monthly basis based on fulfillment of SLA parameters	We suggest that Service Provider will submit the invoice by 5th of the following month and PFRDA to make the payment within fifteen (15) days from the date of receipt of invoice. And also suggest that Any delayed payment beyond the stipulated period will attract a penalty of 1.5% per month on the original invoice amount	As per the terms and conditions laid down in the RFP

		after the successful operationalization of the NPS/APY Information Helpdesk. However, this time frame is indicative and would be finalized mutually between PFRDA and the successful bidder		
87	clause 8.9, Pg. 29	Sub-Contract Clause The Information Helpdesk shall neither assign nor transfer, entirely or in part, the obligation derived here from in favor of any third party.	We suggest to relax this clause giving Service Provider the right to Subcontract this agreement to any of its Affiliates, subsidiaries or group entities with notice.	As per the terms and conditions laid down in the RFP
88	3.3 Channels Support Page no. 8	Outbound services include calling prospective and existing subscribers providing information about schemes, and processes, answering emails and sending SMS/emails to subscribers about scheme details, processes, forms, location details of PoP/PoP-SP etc.	Do we get Standardized / Pre-approved content of SMS/Email from PFRDA.	The SMS and the EMAIL template will have to be designed by the service provider. The necessary information would be provided by PFRDA through mutual discussion.
89	3.10 Manpower requirements Page no. 10	The Executives should be at least graduates and with not less than 1 year of work experience in call center environment and should be fluent in English and Hindi or other Indian regional languages as required in table at S.No. 2 above (Sl.#8). Executives should have basic computer knowledge of operations, spreadsheets and documenting software like	1) We request PFRDA to consider for Executive with mix of fresher : Experience OR 2) We request you to consider a experience of minimum 6month exp 3) We also request PFRDA to provide relaxation on Hiring freshers & Under Graduates for Regional language Executive. 4) We recommend mix of Grads & Undergrads for experienced resources	As per the terms and conditions laid down in the RFP

		Microsoft Word etc. Prior experience in handling calls for any government setup and basic knowledge of finance will be preferable.		
90	3.10 Manpower requirements Page no. 10	The Service Provider should provide a minimum of 20 executives to handle the functions/ activities at the start of the project with a provision to scale up the number of executives at short notice as per the following matrix.	1) Please specify the channel/Desk wise employee bifurcation. (i.e. Outbound, Inbound & Email)	This may be decided by the service provider as per the volume of the calls
91	3.13 Process Requirements page no. 12	3.13.4 The Executives would also be required to refer to some relevant websites maintained by Central/ State Government agencies/PFRDA as well as other popular and reliable websites to answer some of the queries like market information and other related queries etc. from the citizens. The Executive must therefore have online access to these sites over the Internet.	We request PFRDA to share the list of websites which are relevant for this project.	Yes, the same will be shared.
92	4.4 Information Help Desk Service Level Requirements & Measurements Page no. 16	Capacity Utilization - Utilization <72 - Score 0 Formula : = (Total Inbound Calls Answered + Total Outbound Calls*) Average Attendance for Month X No. of Days of Operations	High avail and less leads shall impact the utilization%, hence we request PFRDA to relook in this parameter.	As per the terms and conditions laid down in the RFP
93	4.4 Information Help Desk Service Level Requirements &	Customer Satisfaction - Customer Satisfaction Score <90% - Score 0(Zero)	Customer satisfaction score may dip on cases where Executive have provided all necessary information as	As per the terms and conditions laid down in the RFP

	Measurements Page no. 16		per Guideline or SOP however customer didn't find the information satisfactory due to process limitations, Technology limited or any other limitation. Hence we request PRFDA to consider this aspect while finalizing the customer satisfaction score.	
94	2. Pre-Qualification / Minimum Eligibility Criteria page no. 6	The bidder should be operating a call center process for at least 02 Financial Institution and for atleast 01 Govt. organization (Govt. Departments /Central, State PSUs/PSBs /Autonomous Bodies) during the last 3 years as on the date of submission of bid. The assignment should be for at least 1 year for each of the Financial Institution and Govt. organization.	We understand that Financial Institutions means operations for any Banking and Financial organization please confirm	Yes, the same will be considered.
95		The bidder shall have at least 200 inbound call center seats at a single location in India - Documentary proof/ valid project agreement	Request you to consider a undertaking from authorized signatory / chartered accountant as a documentary proof due to confidentiality agreements signed with existing clients	As per the terms and conditions laid down in the RFP
96		The bidder should be capable of providing call center services in multiple Indian languages and currently serving clients in at least five or more languages in the past one year viz. Hindi, English and any 03 regional languages.	Request you to consider a undertaking from authorized signatory / chartered accountant / CHRO as a documentary proof due to confidentiality agreements signed with existing clients	As per the terms and conditions laid down in the RFP
97		The Bidder should have a Disaster Recovery Policy and Business Continuity Plan. -	We have standard technology BCP and DR is created specifically for clients where there's an ask. Please	Single location is required for help desk. DR can be at an alternate location.

		Copy of approved DR/BCP policy along with proof of DR site arrangements	confirm whether the operations to be spread across two locations during BAU to provide DR if yes please suggest if we can consider the secondary location basis our expertise.	
98	3. Scope of Work page no. 7	this facility will facilitate generation of leads for NPS/APY enrollments and transmitting the same to distribution channel or intermediaries in the NPS architecture as required from time to time.	Please elaborate how will the agents generate leads - data dump will be provided by PFRDA, digital leads etc.	The relevant data for out bound calling and any update to be shared with the subscribers or the public in general will shared by PFRDA.
99	3.2 Languages Support: page no. 7	The Call Centre-Service Provider shall engage the desired number of qualified call executives conversant with Hindi/English and other regional languages viz. Tamil, Telugu, Bengali, Malayalam, Kannada, Marathi, Gujarati, Assamese and Odia.	Please confirm whether PFRDA has any preference of deployment location. Can we deploy resources for southern languages, Marathi and Gujarati out of other locations wherein this skillset is readily available	Preference- Delhi & NCR region. Yes
100	The Information Help Desk should support the following channels of communication to all stakeholders through: Page No 8	Channels supported - SMS	Please elaborate the functioning of SMS channel in Inbound & Outbound	As per the terms and guidelines laid down in the RFP
101		The Service Provider would also route calls to intermediary's registered with PFRDA viz. PoP, CRA, Trustee Bank, Pension Funds, Annuity Service Providers etc. as per subscriber/caller needs.	Please let us know how will these calls be routed. Calling platform access to be done extended to these staff or ticket to be registered in system	The system should have the capability of call routing facilities.

102	3.5 Hours of Operation Page No. 8	This may be scaled up to a 24x7 support at a future date depending on volume and /or other parameters.	Please confirm whether commercials to be submitted considered 24/7 operations or a change request will be initiated when the operating hours is changed	Commercials to be submitted for duration mentioned in RFP at present.
103	3.11 Knowledge Management Page No 10	The service provider will develop training methodology including training material in English, Hindi and other Indian languages for imparting knowledge to the Executives in consultation with PFRDA.	We ensure to hire resources who understands English. Please confirm whether this requirement will still be mandated	As per terms and conditions laid down in RFP.
104	Clause No 3.13.8 page No 12	The Expert at Level 2 Support shall answer/respond to the calls escalated by the Executive (Level 1 Support) to the best of his ability and understanding of NPS/APY.	Please confirm whether this L2 needs to be setup by the service provider if yes kindly share the count of resources to be deployed and whether skillset of these resources remain the same	The L2 needs to be setup by the service provider. The service provider may have one or more person deployed for handling the level 2 query.
105	Clause No 3.13.10 page No 12	A dedicated e-mail ID is to be created for handling routine queries of prospective as well as existing subscribers. Standard reply,	We understand that the language support for email will be in English please confirm	
106	Clause No 4.1 page No 14	4.1 Deliverables and Service Level Requirements The deliverables for this RFP/Assignment will be as follows:	We understand that these requirements to be shared post award of contract. Please confirm	
107	4.2 The Schedule for implementation of the Project is tabulated below: - Page No 14	Training of Executive/Staff on Information Help Desk Operations - T+15	Considering the skillset and language requirements request you to give us 4 weeks as mentioned in 3.10 section	
108	5.3 Earnest Money Deposit (EMD) - Bid Security Amount Page No. 18	Bidder will have to provide an EMD/Bid security of Rs.50,000/- (Rupees Fifty thousand only) by way of electronic payment through NEFT/RTGS	As an organization practice, we submit EMD as a bank guarantee with a validity of 120 days from bid submission request you to consider the same	As per terms and conditions laid down in the RFP.

109	6. Evaluation of Bid/Proposal Page No 22	Call center services provided in Hindi, English and other regional languages	Request you to consider a undertaking from authorized signatory / chartered accountant as a documentary proof due to confidentiality agreements signed with existing clients	
110	6. Evaluation of Bid/Proposal Page No 22	Number of call center seats in a single location in India	Request you to consider a undertaking from authorized signatory / chartered accountant as a documentary proof due to confidentiality agreements signed with existing clients	
111	6. Evaluation of Bid/Proposal page No 24	Experience of executives proposed (related to call center services)	Request you to please exclude this parameter as experience of resource is directly proportional to the cost of solution	
112	Page No 41	Annexure IX: Curriculum Vitae Format	Kindly let us know what details needs to be shared currently at RFP stage as hiring / deployment of the resource will be done post award of contract	As per section 3.10 in the RFP there is a requirement of 20 executives. Annexure 9 is required for existing resources available with the service provider for technical scoring.
113	Page No. 18 5.3 Earnest Money Deposit (EMD) - Bid Security Amount	Bidder will have to provide an EMD/Bid security of Rs.50,000/- (Rupees Fifty thousand only) by way of electronic payment through NEFT/RTGS	As per Public Procurement Policy of Ministry of MSME under Section 10, MSMEs are exempted from furnishing of tender fee and EMD. Moreover, recently Government of India through its Office Memorandum No. F.9/4/2020-PPD Dated the 12th of November 2020 instructed all the government department of India & PSUs that any department will not ask to submit EMD but only for Bid Security Declaration. Hence, you are requested to kindly allow exemption for registered MSME Bidders for submission of EMD & Tender Fee.	EMD exemption available to the bidding firms under MSE category as per GFR Rule 170 (i). The bidder seeking EMD exemption, must submit the valid supporting document i.e. MSME certificate, for the relevant category.
114	Page No. 36 B. Eligibility Criteria	Details of center/location having maximum number of seats for in-bound call center	We respectfully request that you consider revising the minimum number of seats required.	As per the terms and conditions laid down in the RFP

		in India (minimum 200 seats) 200 and up to 300: 5 Marks 301 – 700 : 7 Marks Above 700: 10 Marks	Specifically, we would like to propose the inclusion of a total of 200 seats. Making this adjustment would facilitate a more equitable and competitive tender bidding process.	
115	Clause 3 of Pre-qualification criteria at Page No. 6	The bidder should be operating a call center process for atleast 02 Financial Institution and for atleast 01 Govt. organization (Govt. Departments /Central, State PSUs/PSBs /Autonomous Bodies) during the last 3 years as on the date of submission of bid. The assignment should be for at least 1 year for each of the Financial Institution and Govt. organization.	Experience in Govt. Departments /Central, State PSUs/PSBs /Autonomous Bodies should be sufficient. Please remove experience in 2 Financial Institution requirements.	As per the terms and conditions laid down in the RFP
116	Clause 3 of Technical Evaluation at page No. 23	Call center-related services provided to financial institutions during the last 3 years as on the date of submission of bid. The assignment should be for at least 1 year for each of the Financial Institution. 2 ≤ 3 clients: 1 Above 3 ≤ 5 clients: 3 Above 5 clients: 5	We suggest and request you to remove this clause	As per the terms and conditions laid down in the RFP
117	General	PRI and Tollfree	Please confirm, who will bear the cost of PRI & Toll free, Vendor or PFRDA?	PFRDA
118	2, point 2, page # 6	The bidder should have been in the business of providing Business Process Outsourcing/Call Center/Contact Center/ITeS-related services for the past 5 years. The bidder should hold a valid license of the above-	As per GOI order # 18-8/2020-CS-I OSP Certificates is no longer required, kindly modify this clause as below: "The bidder should have been in the business of providing Business Process Outsourcing/Call	As per the terms and conditions laid down in the RFP



		mentioned business in India and should have provided inbound call centre services for the past 5 years	Center/Contact Center/ITeS-related services for the past 5 years."	
119	2, point 4, page # 6	The bidder shall have net profits in at least three out of the previous five financial years (FY 2018-19 to 2022-23).	Request to modify the clause as below: "The bidder shall have net profits in past three financial years (FY 2020-2023)."	As per the terms and conditions laid down in the RFP
120	2. Pre-Qualification / Minimum Eligibility Criteria, Point No.3 page No. 6	The bidder should be operating a call center process for atleast 02 Financial Institution and for atleast 01 Govt. organization (Govt. Departments /Central, State PSUs/PSBs /Autonomous Bodies) during the last 3 years as on the date of submission of bid. The assignment should be for at least 1 year for each of the Financial Institution and Govt. organization.	Like to request if Financial Institution restricts not to consider work experience with FinTech's dealing in 1. Stocks & Mutual Funds, 2. Dealing in Money Transfers for a Bank in Rural Towns, 3. Gold Loans, and 4. Company/ financial services platform catering to the informal sector. A few are our customers. Like to request if the BPO Customer Experience (Inbound and Out calling) can be considered making us eligible in the RFP. Like to confirm we are meeting all rest of Eligibility Criteria's.	Engagement by Fintechs handling sale, distribution, etc. of financial products and services will be considered.
121	6. Evaluation of Bid/Proposal Point No. 1 page No. 23	Number of years of experience as an entity providing Business Process Outsourcing/ Call Center/Contact Center/ITeS related services in India as on the date of application.	To clarify, Col (Certificate of Incorporation) shall be considered for the calculation of number of years.	As per the terms and conditions laid down in RFP.
122	6. Evaluation of Bid/Proposal Point No. 4 Page No. 23	Call center related services provided to Government Client - Govt. Departments/Central, State PSUs/PSBs/Autonomous Bodies during the last 3 years as on the date of submission of bid. The assignment	To clarify, and like to request work experience from a Public Relations Department between year April 2019 - March 2022 shall be considered.	Kindly refer RFP. The relevant clause is explicit.

		should be for atleast 1 year for each of the Institution.		
123	SMS Integration:	If SMS integration is required, who will own the DLT template registration work, as SMS templates are required to be pre-approved by ISP before sending them to end users.		The SMS template will have to be pre-approved by the PFRDA.
124	Centralized CRM Application:	Is there any Centralized CRM application deployed by PFRDA, we have to deploy and manage our own CRM?		The service provider will have to deploy and manage its own CRM
125		If we have to manage our own CRM, What type of Private Data will be shared with contact centre and is there any specific guideline/requirement to manage that?		
126		Are data retention period defined for call details, call recordings and CRM data, or we can follow our general practice of keeping 3 months data online and 1 year data offline?		
127	MIS reports and CRM data:	What would be the communication medium for sharing MIS reports and CRM data as it may contain end user's personal information?		