

Request for EOI for Appointment of Consultant for CRM and EDW - Prebid Queries and reply - Annexure 1

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1		Point no. 3.1 – Scope of work	CRM software which was procured by our bank has to undergo a depth study whether it will suit to the current requirements and take necessary steps to emulate a suitable OCRM and ACRM for our bank.	What is the existing CRM software in the Bank?	Operational CRM is available with the bank. Details will be revealed to the successful bidder.
2	5	Scope of Work		Please provide details on the existing CRM system	
3	5			Which is the CRM tool that the bank has purchased?	
4	Pg 5, bullet 4 of scope	Others		Has a CRM software already been procured by the bank?	
5	General			We request the Bank to provide some primary information on the existing CRM package (developed in-house / off-the-shelf / highly customized package) and the extent of implementation & usage by the business users? This would be help in sizing our effort for the module as the consultant is required to a detailed study of the package to evaluate its suitability going forward. We were	

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				informed during the pre-bid meeting that just one module of the CRM package has been implemented / is in use as on date.	
6		Point no. 3.1 – Scope of work	Should also provide work-flow audit certificates?	What is meant by Work-flow audit certificates?	Audit Certificate should be given by an independent auditor identified by bank after completing every milestone. SI should provide audit certificate from independent auditor which has to be verified by the consultant and confirm the same to the bank.
7	5	Scope of Work		Please elaborate on the statement "Should also provide work-flow audit certificates and post implementation process audit certificates for the entire implementation"	
8	5	Scope of Work		Please elaborate on the statement "Facilitate to obtain audit certificates for performance at all levels / after all installations"	
9		Point no. 3.1 – Scope of work	Bullet point no. 7	scope also mentions that vendor should provide "work flow audit certificates and post implementation process audit certificates". What do you mean by "audit certificates". Can vendor provide the post implementation process audit	

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				certificates.	
10		Point no. 3.1 – Scope of work	Bullet point no. 8	The scope says that vendor should facilitate to obtain audit certificates for performance at all levels / after all installations. We understand that this certificate to be obtained from the System Integrator. Kindly confirm whether our understanding is correct.	
11	Page 5	Section 3.1 - Scope of Work	Should also provide work-flow audit certificates and post implementation process auditcertificates for the entire implementation	We request Bank to further clarify the same.	
12	Page 5	Section 3.1 - Scope of Work	Facilitate to obtain audit certificates for performance at all levels / after all installations	We request Bank to further clarify the same.	
13		Point no. 3.1 – Scope of work	The 1st bullet point under scope states “accurately identifying the business information that must be contained in the Warehouse”	Kindly clarify what “Accurately” means. Does it mean “comprehensive”. Request to define accuracy and comprehensive.	

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14	Point no. 3.3	Point no. 3.3	Confidentiality	As per the clause, the confidentiality period is perpetual. We understand that there is no much confidential information are shared other than process etc. by the client and kindly share the information only on need to know basis. Considering the same, request the Bank to make it to 3 years.	Confidentiality period is perpetual
15	NDA	Others		Kindly Clarify if, bidder should have a proper documentation retention plan to comply with NDA other than: (a) should not preclude the ability of the consultant to retain its internal working papers to evidence its professional involvement with the services; such working papers would of course be provided with the applicable confidentiality requirement; (b) will not extend to information shared electronically through emails which get automatically archived under our IT policies; such archived information would of course be provided with the applicable confidentiality requirement;	

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				(c) should not entail any further certification requirement since in any event this would be contractually agreed - thereby obviating the need for further certifications	
16		3.4 Restrictions	Consultant shall not be hired for any assignment that would be in conflict with their prior or current obligations to other Banks, or that may place them in a position of not being able to carry out the assignment in the best interest of the bank.	What kind of assignments will be considered as conflict of interest?	The identified persons allotted to our bank should not be hired for any assignment that would be in conflict with their prior or current obligations to other Banks, or that may place them in a position of not being able to carry out the assignment in the best interest of the bank.
17		4.17	Termination	Termination clause is one sided. Vendor does not have option to terminate the agreement. Considering the period of the assignment it is advisable to have both side termination.	Please adhere to EOI terms.
18	Page 12	Section 4.17 – Termination for Convenience	The purchaser, by written notice sent to the supplier, may terminate the Contract, in whole or in part, at any time for its convenience.	Bank is requested to consider the termination clause as mutual for both Purchaser and Supplier.	

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19		4.22	Can Milestone 1&2 be done in parallel	The output from Milestone 2 for the Data Cleansing assessment would be used to develop the RFP which is a deliverable for Milestone 1. Hence these two milestones would need to be done in parallel.	Payment clause holds good, payment for milestone 2 will be given after milestone 1 only.
20		4.22	General	Please validate our understanding that one single RFP for procurement of the Data Cleaning and Data integration tools, EDW & BI solutions is required. Whereas the Bank already has an existing tool for CRM (both OCRM and ACRM) and would like to evaluate the use of the same for the requirements gathered as part of Milestone 1.	RFP can be more in number.
21		4.22	Helping the Bank in benchmarking the Hardware and Software as well as in Installation and configuration	What is meant by Benchmarking the Hardware and Software? Would this be done by the selected SI vendor subsequent to the Purchase Order being provided?	Installation and configuration to be done by SI. Consultant should derive the optimum benchmark of the HW, SW and system requirement specifications in collaboration with SI or on its own.
22		4.22	Milestones	Please provide details of Milestone 5	Pl. refer the amendment sl. No 3, 4 & 5

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23		4.23 Payment Terms	15% on completion of Milestone 5	Milestone 5 is missing in the document	
24		4.22	Milestones	Will the Bank implement the Operational and Analytical CRM based on the deliverables provided in Milestone 2?	Pl refer the amendment Sl.No 7 & 8
25		Annexure C	Overseas projects for EDW, OCRM and ACRM implementation in financial sector (Optional Eligibility)	Would references for a Campaign Management and tracking system which is an integral component for ACRM, be considered in lieu of the term ACRM?	No
26		Point no. 2 (6) of RFP (Page no. 4) and point 6 in Annexure 3	the name of the persons who have been allotted to the project should not be disturbed and the willingness on the part of the consultant are must for the selected person. He / she should maintain strict confidentiality of the Bank's principles / practices and not disclose them	The project is for 30 months. During this time, there may be changes in team structure due to several reasons like resignation etc. In this scenario, it is very difficult to accept such clauses. Kindly request the client to define the situations where this statement is not applicable.	In case of only resignation a competent person should be replaced and ensure proper continuity of the project.

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27		page no. 33	Last paragraph on page no. 33 states that "the receiving party may disclose confidential information to consultants only if the consultant has executed non-disclosure agreement with the Receiving Party"	As per our understanding "consultant" means sub-contractor. Kindly clarify	Consultant cannot be a sub-contractor.
28		Point no. 3.1 – Scope of work	Last para on 6th page - Preparing and finalising the agreement between the Bank and the System Integrators / Vendors.	Does this mean professional legal advice on contract formulation? Will you be engaging any legal firm for this scope. If yes, you may have to sign a consortium agreement with them.	Assisting in finalizing the agreement between the bank and SI by the user department and it will be vetted by our Legal Department. The agreement with bank and SI will be perpetual
29	Pages 5-6	Legal		The scope of work includes "designing RFPs and contracts between the bank and the SI/Vendors". Please clarify that our services will not include specialist legal advice, for which the bank should engage its own legal team/attorneys.	
30	Page 6	Section 3.1 - Scope of Work	Preparing and finalizing the agreement between the Bank and the System Integrators vendors	Bank is requested to clarify if they will engage their legal department or hire a legal partner for developing the contract. As far as we are concerned, we can provide assistance in finalizing the	

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				agreement between the Bank and the System Integrators in technical areas, while we are not legal experts.	
31		Section 3.1		With reference to Section 3.1, we kindly request the Bank to clarify the type of legal assistance required from the consultant	
32	Page 6	Section 3.1 - Scope of Work	The EDW project should be able to implement into smaller modules and able to project the ROI to top management after every implementation	Bank is requested to provide further clarifications on this statement.	The consultant must ensure that SI gives some deliverables like dashboards, etc on frequent basis to top management while the project is under development.
33		Legal		The scope of work requires the consultant to assist the client in vendor selection. This potentially results in a risk perception with respect to third party claims on the selected consultants by such third party vendors. Kindly clarify if the bidder is open for third party claims too?	The selection process followed as per CVC guidelines and Bank decision is final.

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34		Section 4.16	Legal	W.r.t notice period of termination, would the bank be willing to consider providing a 30 day notice period in which such service related issues can be rectified?	Please adhere to EOI terms.
35		Legal		Can the bank consider inclusion of a Force Majeure clause, to the effect "The bank will not be liable if bidder fails to meet its obligations due to matters beyond its reasonable control"	Bank will consider the inclusion of force majeure at the time of execution of agreement.
36	Acceptance Criteria	Others		Can deliverable(s) acceptance process and criteria, against which deliverables shall be adjudged, be considered to be documented in the proposal and final contract ? This way bidder thinks it would be fair and equitable along with being clear from the beginning.	Please adhere to EOI terms.
37	El criteria pt 1	Others		IS there any specific format for declaration	Declaration must be given in company's letterhead confirming the eligibility criteria.
38	El criteria pt 6	Others		Point # 6 - Is there a format required for the declaration?	

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39	El criteria pt 2	Others		What is meant by 'Industrial Experience' of the company and how is it different from 'being in the business'	Consultant should be in existence of 15 years or more and providing consultancy service for atleast 5 years.
40	El criteria pt 3	Others		Documentary proof asks for certificate where consultant has "implemented" EDW and CRM, but criteria talks about providing consultancy services. Please clarify.	Certificate from the bank/Financial organisation which has implemented EDW , OCRM and ACRM using the consultancy services of the bidder.
41	El criteria pt 5	Others		Point # 5 - What is meant by 'Optional eligibility'?	It is not a compulsory eligibility criteria.
42	Page 4	Section 2 - Eligibility Criteria	Point 5: Criteria Overseas projects for EDW, OCRM and ACRM implementation in financial sector (Optional Eligibility)	<p>We request Bank to clarify on what they mean by “Optional Eligibility”</p> <p>We request the Bank to consider consultancy services experiences for India only since the Datawarehouse project and local project experience will be beneficial for Indian context only.</p>	<p>Optional eligibility - not a compulsory eligibility criteria;</p> <p>Pl ease refer the amendment sl. No. 1</p>
43	4.21 - Evaluation Metrics	Others		Point # 4 - In case of non-banking financial organizations such as insurance and asset management, what would be the definition of 'Large	Large Organization - above 5000 crores business.

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				organization'	
44		Section 4.21		With reference to the Evaluation Metrics provided under Section 4.21 of the EOI, we kindly request the Bank to define "large financial organizations" on the lines of the definition provided for Large Banks. This will aid us in getting and highlighting relevant credentials – along with supporting documents – categorized under the appropriate group	
45	4.22 - Milestone 4	Others		Bullet points # 2,3 seem to be activities of the SI that is selected for the implementation. Please clarify?	The consultant should assist the bank during the implementation of activities by SI upto milestone 7 is completed.
46	5.8 Annexure H	Others		Sl # 2,3 - What are the documents required to be submitted as proof for number of banking and IT professionals on the rolls of the organization	"Documents submitted as proof" has to be submitted by the bidder's, HR Department duly signed by authorised signatories.

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47	Defect Remediation (page 30, Contract Form, clause 3)	Others		Can we infer the same as below: In view of the foregoing, please consider qualifying this appropriately from a technical perspective in terms of (a) an acceptance criteria against which our deliverables shall be evaluated and (b) an outer time limit within which such defects which are solely attributable to us is brought to our notice for rectification. Depending on the specific nature of services, such defect remediation and the operational modalities thereto may need specialist consulting RM consults	Technical and domain expertise (Expert Committee) will evaluate the deliverables. Time limits varies depending on the intensity of the deliverables.
48	section 4.23	Others		Business team to carefully review the payment terms - Is there leverage to make this contingent on "submission of deliverables"?	Please adhere to EOI terms.
49	Reciprocal Responsibilities of the Client	Others		Can bank provide details on its role/responsibilities clearly as part of this engagement?	The proposed EDW and CRM module should be in tune with the business requirements of the bank. Bank will provide the necessary inputs.
50	General			How many departmental needs are to be satisfied from the expected EDW?	Entire bank's requirements.

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51	General			Are there any technology platform preferences for EDW?	We are open to all subject to scalability and satisfactory performance.
52	16			How good is the current data quality?	To be assessed by the bidder along with the banks team and expert committee members.
53	5			What are the ETL tools currently in use?	Few programmes are developed in-house.
54	General			Any indication of the data volumes	To be furnished to the successful bidder on a need to know basis.
55	General			Data retention policies if any?	As per regulatory norms
56	5			What is the source platforms based on, i.e. are they on mainframes or a combination of mainframes plus flat files	Will be furnished to the successful bidder.
57	General			What is the Scope of CRM? What functionalities are in scope?	OCRM - Sales Force Automation, Campaign Management, lead generations, lead management etc. ACRM - Acquisition Gross/up sell Churn Retention, default fraud detection, Customer segmentation etc.

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58	5	Eligibility Criteria		Point no. 3 in Eligibility Criteria states that the Consultant should have provided consultancy services and project management on implementation of Enterprise wide Data Warehouse, OCRM and ACRM during the last five years for at least one large bank / financial organization. Is it ok to have this experience across several client implementations or does IB need everything under one single client implementation.	During evaluation, preference / consideration will be given to the single client implementation of EDW, OCRM and ACRM, though multiple client implementations may not be a disqualification.
59	5	Scope of Work		Can you please provide the number of Departments/ Department Heads or other stakeholder groups with whom discussions need to be conducted for requirements or relating to the project?	All functional departments of the bank.
60	5	Scope of Work		Please specify the functional processes/ components (e.g.: Lead Management, Sales Management, Service, Marketing etc) that Indian Bank wants to implement as part of the CRM initiative.	All areas of the business activities of the bank with a special reference to Marketing.

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61	5	Scope of Work		Please provide the Lines of Businesses for which the CRM system needs to be implemented.	
62	5	Scope of Work		Is there currently a BI tool in place? If yes, please elaborate on the current tool.	No.
63	5	Scope of Work		Is IB ok with the vendor having a team of consultants coming with experience across BFS/CRM/EDW areas?	Successful Consultant has to bring the experts in the field of EDW, OCRM, ACRM, BI and domain.
64	5	Scope of Work		Please specify, what level of requirements bidder will capture and what level chosen SI would capture	Please refer to the scope of work for the bidder's requirement with regard to the selection of the consultant. The requirement of SI will be finalized by the bank in consultation with the successful consultancy bidder.
65	5	Scope of Work		What will be the base location of the Consultants for the project? Will the consultants be required to travel to locations other than the base location within India? If yes, please provide the list of locations that the consultant will need to travel within India.	Chennai.

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66	Page6	Scope of Work		Please elaborate on the kind of training that needs to be provided to end users? Would it also entail creation of Training Material	Successful bidder has to take care while drafting the RFP for SI as well as he has to co-ordinate with the SI while imparting the training with the required training material to the end users.
67	Page6	Scope of Work		Please elaborate on the expectations from the BPR exercise. Please identify the functionalities for which business process reengineering exercise needs to be conducted.	BPR With respect to implementation of EDW, OCRM and ACRM need to be addressed. ie Across all functions of the bank, where they will have impact
68	Page 6	Section 3.1		The scope of Business Process Engineering (BPR) exercise, as mentioned under Section 3.1 on Page 6 of the EOI, is open-ended. We understand that the BPR exercise will involve assessment & redesign (wherever applicable) of all underlying business processes impacted by EDW implementation. However it would be of help to consultants if the Bank could highlight a high-level list of processes.	BPR With respect to implementation of EDW, OCRM and ACRM need to be addressed. ie Across all functions of the bank, where they will have impact

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69	Page 6	Section 3.1 – Scope of Work	Consultant must conduct Business Process Reengineering (BPR) exercise for smooth and seamless transition from product centric mindset to customer centric mindset.	Bank is requested to provide further clarifications on this statement. As far as we are concerned, the Business Process Re-engineering exercise may not be applicable as part of scope of the consultant for the Datawarehouse vendor evaluation, selection and project management.	
70	6	Scope of Work		What are the deliverables expected as part of the BPR exercise and would it need to be conducted as part of the Requirement gathering etc exercise in the first 4 months?	Detailed discussion will be held with the successful bidder
71	7	Scope of Work		RFP Scope states, “Educating the business community about the realm of possibilities that are available to them through Data Warehousing”. Bidder conducts Solution Envisioning workshops to get business buy-in on the proposed approach. If IB expects something else, please clarify.	The modalities will be discussed in detail with the successful bidder to Educate the business community.
72	22	Annexure		Annexure need exhaustive details over the referenced client. This may be a challenge due to confidentiality	Please adhere to EOI terms.

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				issues	
73	23	Annexure		IB has requested: 'Date when first client site went live (for EDW, OCRM, ACRM) with name of client.' Please elaborate	Please adhere to EOI terms.
74	General Clarification	NA	NA	We request the Bank to clarify if this is an Expression of Interest or a Request for Proposal since the entire end to end procurement is being conducted.	EOI
75	General clarification	NA	NA	Is there a Disaster Recovery site envisioned for the project	The same will be discussed with the successful bidder.
76	Page 4	Section 2 - Eligibility Criteria	Point 3:Criteria The consultant should have provided consultancy services and project management on implementation of Enterprise wide Data Warehouse, OCRM and ACRM during the last five years for at least one large bank/financial organization.	<u>Section 2 - Eligibility Criteria : Point 3:Criteria</u> We request the Bank to consider the broader definition of the Bank to include the following- Scheduled Commercial Bank- Regulatory Body/Ministry (RBI, Financial Intelligence Unit, etc)- Associations (Indian Banks Association, National Housing Bank, etc)	As per EOI terms consultancy services during last five years for at least one large bank/financial organization is compulsory. Commercial Bank also holds good.

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77	Page 15	Section 4.21 – Evaluation Metrics	Point 4: <u>Criteria Description</u> No. of **large banks/financial organizations to which the consultant has provided consultancy services on EDW during the last 3 years	<u>Section 4.21 – Evaluation Metrics :</u> <u>Point 4: Criteria</u> We request the Bank to consider the definition of the Bank to include the following <ul style="list-style-type: none"> - Scheduled Commercial Bank - Regulatory Body/Ministry (RBI, Financial Intelligence Unit etc) - Associations (Indian Banks Association, National Housing Bank, etc) 	
78		Section 2 - Eligibility Criteria	Point 3:Criteria The consultant should have provided consultancy services and project management on implementation of Enterprise wide Data Warehouse, OCRM and ACRM during the last five years for at least one large bank/financial organization.	<u>Section 2 - Eligibility Criteria Point 3:Criteria</u> We request the Bank to consider the broader definition of a Financial Institution to include the following <ul style="list-style-type: none"> - Insurance companies/NBFCs /Mutual Fund companies/Securities/Investment Banking 	

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79	Page 4	Section 2 - Eligibility Criteria	Point 3:Criteria The consultant should have provided consultancy services and project management on implementation of Enterprise wide Data Warehouse, OCRM and ACRM during the last five years for at least one large bank/financial organization. Consultancy experience in this area for more banks will have better weightages	We request the Bank to clarify the point "Consultancy experience in this area for more banks will have better weight ages" Since this section is only the eligibility criteria the weight ages is not applicable as eligibility is based on a "Yes" or "No" scenario. This is more applicable with the Technical evaluation where more banks experience will mean more weight ages.	Please refer the amendment Sl. No : 1
80	Page 4	Section 2 - Eligibility Criteria	Point 3:CriteriaThe consultant should have provided consultancy services and project management on implementation of Enterprise wide Data Warehouse, OCRM and ACRM during the last five years for at least one large bank/financial organization. Consultancy experience in this area for more banks will have better weightagesDocuments submitted as a proof/declarationCertificate	We request the Bank to consider the EDW implementation only. Since this is an eligibility criteria the statement "including CRM is a plus" is not applicable as there is no scoring here.	Please refer the amendment Sl. No: 1

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			from bank / financial organization where they have implemented EDW (including CRM is a plus)		
81	General	Datawarehouse projects and surround applications	NA	We also request Bank to be consider and be sensitive to the relevant terminologies and areas with respect to Datawarehouse projects as follows which go hand in hand with the Datawarehouse implementation - Data Registry/Data pooling/Data Collation - Business Intelligence/MIS Project/Corporate Dashboard solution/Reporting Solution	We will not agree for these change of terminologies instead of Datawarehouse projects.
82	Page 4	Section 2 - Eligibility Criteria	Point 3:Criteria The consultant should have provided consultancy services and project management on implementation of Enterprise wide Data Warehouse, OCRM and ACRM during the last five years for at least one large bank/financial organization.	We request the Bank to not specify any time period for the consultancy services of the Enterprise wide Data Warehouse	Please adhere to EOI terms.

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83	Page 4	Section 2 - Eligibility Criteria	Point 3:Criteria The consultant should have provided consultancy services and project management on implementation of Enterprise wide Data Warehouse, OCRM and ACRM during the last five years for at least one large bank/financial organization.	We request Bank to not consider the Eligibility criteria as End to End since only few Banks across India are in various stages of Datawarehouse Implementation and Project Management of Implementation will be a difficult criteria to Justify. This is in line and with reference to a recent evaluation of a large Public Sector Bank in India which has relaxed the criteria of Project Management.	The bidder should have been selected and providing consultancy services including implementation part at least in one large bank / financial organization.
84	General	Proof of Consultancy services	NA	We request the Bank to accept either of the following as proof for eligibility criteria (Section 2) and Evaluation Matrix (Section 4.21) <ul style="list-style-type: none"> • Letter of Intent issued from Organization on letterhead • Purchase Order issued from Organization • Copy of Contract • Certificate on organization letterhead 	First 3 documentary proofs are acceptable for all cases. In case of large banks/public sector undertakings/ government departments certificates issued in the letterhead is also accepted.
85	Page 5	Section 3.1 - Scope of Work	Implement a feasible methodology within the bank for data cleaning task along with the required service tools either with in-house or with	We request Bank to further clarify the same.	Refer scope of work.

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			procurement.		
86	Page 6	Section 3.1 - Scope of Work	Customer lifetime value, customer identity, location, product, behaviour study etc with profit analysis channels.	We request Bank to further clarify the same.	These details should be understood by way of terminology itself.
87	Page 6	Section 3.1 - Scope of Work	The Consultant must provide a site visit for Indian Bank expert committee to their organization before finalizing the BID.	This point is relevant for a Datawarehouse vendor not a Consultant. Bank is requested to correct the same.	Bank will visit only the successful bidder site.
88	Page 6	Section 3.1 - Scope of Work	ETL tool to extract the data from our various applications line CBS, Exim Bills, FI, CRISIL, DMAT, Credit Card software, Treasury, AML, MIS TELOSTO, Internet Banking, and TBC legacy applications, etc	We request the Bank to confirm if this would be the entire list of applications as part of the scope for Datawarehouse. If there are more than Bank is requested to provide a list of the same.	It is only an indicative list, the complete list will be disclosed to the successful bidder

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89	Page 5	Section 3.1		We wanted to place a request to the Bank if it is possible to throw more light on the current application portfolio of the Bank, in addition to the list provided under Section 3.1 on Page 5 of the EOI. This will aid in our effort estimation for reviewing the functionality & data structure across all relevant applications.	
90	Page 14	Section 4.20 - Negotiation	The Bank reserves the right to further negotiate on the price offered, with the L1 consultant under exceptional circumstances.	Bank is requested to clarify what the exceptional circumstances may be. Also as per the procurement guidelines, the commercial bid as part of the tender cannot be negotiated.	Under exceptional circumstances the negotiation will be held with the L1 bidder within the ambit of CVC guidelines.
91	Page 15	Section 4.21 - Evaluation Metrics	Point 2: Criteria Description No of Banking domain experts on the payroll of the organization on permanent basis with EDW experience Rules for Awarding marks: 1 mark for every two experts	We request the Bank to consider only Banking domain experts and not combine this with EDW experience since there may not be relevant. Bank is anyways asking for IT professionals with EDW experience.	Please adhere to EOI terms.
92	Page 15	Section 4.21 - Evaluation Metrics	Point 2: Criteria Description No of Banking domain experts on the payroll of the organization on permanent basis	We request the Bank to consider only 1 mark for every one expert	Please adhere to EOI terms

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			with EDW experience Rules for Awarding marks: 1 mark for every two experts		
93	Page 15	Section 4.21 – Evaluation Metrics	Point 3: <u>Criteria Description</u> No of IT professionals on the pay rolls of the organization on permanent basis with EDW experience <u>Rules for Awarding marks:</u> 1 mark for every 5 IT professionals	We request the Bank to relax the criteria of “1 mark for every 5 IT professionals” as this is too strict for such an evaluation. Bank is requested to consider the criteria as “ 1 mark for every 1 IT professionals”	Please adhere to EOI terms
94	Page 15	Section 4.21 – Evaluation Metrics	Point 4: <u>Criteria Description</u> No. of **large banks/financial organizations to which the consultant has provided consultancy services on EDW during the last 3 years	We request the Bank to not specify any time period for having provided consultancy services.	Please refer the amendment sl no. 2

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95	Page 15	Section 4.21 – Evaluation Metrics	Point 5: <u>Criteria Description</u> No. of organizations other than banks/ financial organizations to which the consultant has provided consultancy services on EDW during the last 3 years <u>Rules for awarding Marks</u> 2.5 marks for every large organization	We request the bank to not specify any time period for having provided consultancy services.	Please adhere to EOI terms
96	Page 15	Section 4.21 – Evaluation Metrics	Point 5: <u>Criteria Description</u> No. of organizations other than banks/ financial organizations to which the consultant has provided consultancy services on EDW during the last 3 years <u>Rules for awarding Marks</u> 2.5 marks for every large organization	We request the bank not to have any defined criteria for a large organization for awarding marks since some financial organizations may not necessarily be a large organization	please adhere to EOI terms

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97	Page 15	Section 4.21 – Evaluation Metrics	Point 6: <u>Criteria Description</u> No. of organizations where consultant has provided end to end project management for EDW during the last 3 years <u>Rules for awarding Marks</u> 3 marks for every large organization	We request the bank to not specify any time period for having provided consultancy services.	Please adhere to EOI terms.
98	Page 15	Section 4.21 – Evaluation Metrics	Point 6: <u>Criteria Description</u> No. of organizations where consultant has provided end to end project management for EDW during the last 3 years <u>Rules for awarding Marks</u> 3 marks for every large organization	We request the bank not to have any defined criteria for a large organization for awarding marks	please adhere to EOI terms
99	Page 15	Section 4.21 – Evaluation Metrics	Point 8: Criteria Description No of organizations to which the consultant has provided consultancy services on CRM during the last three years.	We request the bank to not specify any time period for the CRM implementation.	Please adhere to EOI terms

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100	Page 15	Section 4.21 – Evaluation Metrics	Point 10: <u>Criteria Description</u> Responses from reference sites <u>Rules for Awarding Marks</u> E-mails will be sent to reference sites of banks / financial organizations and they will be requested to rank the consultant on a scale of 1 to 10. 2 marks will be assigned for each rank above mean.	We request Bank to clarify on how many banks/financial organizations will they be contacting for reference site feedback?	<u>Bidder has to submit maximum of 10 reference sites e-mail addresses along with contact numbers.</u> Sum of all ranks of all consultant references will be averaged to get the mean value. Any ranking above the mean reference will be awarded 2 marks. Ex : consultant A consultant A reference 1 : 6 marks

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101	Page 15	Section 4.21 – Evaluation Metrics	Point 10: Criteria DescriptionResponses from reference sitesRules for Awarding MarksE-mails will be sent to reference sites of banks / financial organizations and they will be requested to rank the consultant on a scale of 1 to 10. 2 marks will be assigned for each rank above mean.	Our understanding or the rules for awarding marks is as followsExample:There may be 5-10 questions asked by the Bank in their email questionnaire.- For question 1 out if the consultant gets rated 6/10 then he is assigned 2 marks- For question 2 if the consultant gets rated 4/10 then he is assigned 0 marks- For question 3 if the consultant gets rated 7 marks then he is assigned 2 marks.... - And so onWe request Bank to confirm our understanding	consultant A reference 2 : 5 marks . . consultant A reference 10 : 8 marks consultant B consultant B reference 1 : 7 marks consultant B reference 2 : 8 marks . . consultant B reference 10 : 6 marks $\text{mean} = \frac{(6+5+..+8)+(7+8+..+6)}{200} = \text{say } 5$ consultant A = say 4 marks(6, 8) consultant B = say 6 marks(7,8, 6)

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102	Page 15	Section 4.21 – Evaluation Metrics	Point 11: Criteria Description Presentations and evaluation by internal committee Rules for Awarding marks Marks will be assigned by an internal committee based on the methodology and work plan, team composition and presentations Max. Marks :75	Bank is requested to clarify the breakup of the Max Marks of 75 pertaining to this point.	Please adhere to EOI terms.
103	Page 18	Section 4.22 - Milestones	Commencement of data mining; continuous website updating, Auditing and real time updating along with the normal working of EDW and CRM - Provide the acceptable matrices for our bank to reach the ROI. - Any other relevant activities required for total implementation of CRM and Data Warehouse.	We request the Bank to further clarify on what they mean by this	The bidder to co-ordinate with the SI to implement Online / real-time EDW and CRM -The metrics to be provided by the bidder should take care of ROI required by the Bank - This is completeness of project implementation

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104	Page19	Section 4.24 - Order Cancellation and Liquidated Damages	If the consultant fails to complete the assignment as per the timelines prescribed in the EOI and the extensions if any allowed, it will be breach of contract. The Bank reserves its right to cancel the order in the event of delay and forfeit the Performance Guarantee as liquidated damages for the delay	Bank is requested to revise this as follows "The Bank reserves its right to cancel the order in the event of delay and forfeit the Performance Guarantee as liquidated damages for the delay due to reasons solely attributable to the Consultant"	Please refer the amendment Sl. No: 9
105	Page19	Section 4.24 - Order Cancellation and Liquidated Damages	<p>If the consultant fails to complete the assignment as per the timelines prescribed in the EOI and the extensions if any allowed, it will be breach of contract.</p> <p>The Bank reserves its right to cancel the order in the event of delay and forfeit the Performance Guarantee as liquidated damages for the delay.</p>	<p>Bank is requested qualify the delay as non-achievement of the milestone as per section 4.22. In addition, Bank is requested to amend the Liquidated Damages clause as</p> <p>"For every week of delay of the concerned milestone Bank will apply a penalty of 0.5% of the Consultant contract value for every week of delay subject to a maximum of the Performance Guarantee submitted"</p>	

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106		Section 4.24		With reference to Section 4.24 of the EOI, we wanted to check with the Bank regarding the upper cap for liability, in case of delays/ penalties (if any), which came up for discussion during the pre-bid meeting.	
107		Section 4.24	Legal	wrt Liquidated Damages, request the bank to consider the following points:- 1. LD should not be enforced for delays due to reasons which are not within the control of bidder. 2. Objective and fair criteria and process should be followed by the client before invoking the LD for material delays objectively determined to be solely attributable to bidder which have resulted in the delay of the overall target date(s). 3. Any direct or resultant delay attributable to or arising out of any issue escalated by bidder Project team to Client for action or decision shall not be considered by Client for imposition of any liquidated damages.	

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108		Section 3.2 - Terms of Execution of Work	In case the EDW project implementation is not completed within the required time frame, the Bank reserves its right to levy liquidated damages as prescribed in clause 4.24	We understand the milestones that the Bank expects from the Consultant have been clarified as deliverables in the second column in Section 4.22: MilestonesNon adherence to these deliverables due to sole reasons attributable to the Consultant only will be considered for application of Liquidated damages.	
109		3.2 Terms of Execution of Work	In case the EDW project implementation is not completed within the required time frame, the Bank reserves its right to levy liquidated damages as prescribed in clause 4.24.	Will this be for individual milestones or for the whole project duration? Also will the consultant be held responsible for any delay on part of the SI?	
110		Legal		The tender document does not have a limitation of liability cap. Can there be a provision for limitation of liability not exceeding 1x the fees paid to the consultant?	Please refer the amendment sl. No . 10

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111	Page 20	Section 4.25 – Response submission	The technical offers and Indicative commercial offers must be accompanied by EOI document fees of Rs. 2000/, if not already paid, and Earnest Money Deposit of Rs. 2,00,000 (2 lakhs)	Bank is requested to clarify on what they mean by Indicative commercial offers?? Do they mean the masked commercial bid which is usually placed as part of the technical bid envelope	Please read Indicative commercial offer as "Commercial offer"
112	section 4.24	Others		If the consultant fails to complete the assignment as per the time lines prescribed in the EOI, it will be a breach and will trigger LDs. Does this mean, the duration of the project and scope of it is finalized? If yes, has there been any rationale/logic/process adopted in doing this? Can this be shared with the Consultants?	The time limit for various activities is provided as part of the EOI itself.

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113	Page 20	Section 4.25 – Response submission	The technical offers and Indicative commercial offers must be accompanied by EOI document fees of Rs. 2000/, if not already paid, and Earnest Money Deposit of Rs. 2,00,000 (2 lakhs)	Does the bank require the DD of Rs. 2000 and the Bank Guarantee for EMD of Rs. 2,00,000 as part of the technical envelope or do they want a separate submission in individual envelopes outside the technical bid envelope.	DD for Rs.2000 and Bank guarantee for Rs.2 lakhs should be submitted along with the technical offer as mentioned in clause 4.5. The technical offer should be addressed to the Asst. General Manager, Indian Bank, Corporate office, Expenditure dept, 254-260 Avvai Shanmugam Salai , Royapettah, Chennai 600014. In a separate sealed cover duly super scribed "Technical offer for appointment of consultant for CRM and EDW project". The technical offer cover and commercial offer cover should be put into single cover duly super scribed "Technical offer and commercial offer for appointment of consultant for CRM and EDW project" and the same has to be registered with the officer available at the venue before dropping the cover in the box provided at the expenditure dept. at corporate office.
114	Page 33	Non-Disclosure Agreement	NA	Bank is requested to confirm whether the Non Disclosure Agreement is to be submitted with the technical bid or	NDA should be submitted by the selected bidder only

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				only by the selected bidder at a later stage after the consultant selection	
115	General	NA	Overall evaluation criteria	Bank is requested to clarify if the overall vendor evaluation after meeting the eligibility criteria and 70% cutoff is going to be purely on commercial basis or the final vendor would be selected on a techno-commercial evaluation approach.	Consultant who scores 70% mark in Technical evaluation process will alone be eligible for commercials.
116				We kindly request the Bank to clarify if the final evaluation would be on the basis of (T1 + L1). If the Bank could also highlight the weightages for technical and commercial offer evaluation scores, it would be helpful	
117	General	NA		We request Indian Bank to clarify if they are accepting bids from Consultants/bidders who are associated through subsidiaries/sister concerns with agencies/organizations who are into the business of supply of Datawarehouse/Business Intelligence/CRM solution & Implementation	Bank will not accept bid from such bidders where there is a conflict of interest.

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118				As discussed during the pre-bid meeting, there could be a scenario wherein the consultant might be developing, floating and managing three separate RFPs – one each for EDW, CRM and Data Cleaning. We request the Bank to clarify if the overall timeline limit (maximum of 30 hours) will continue to hold good in the above scenario.	Please adhere to EOI terms
119	Page 23	5.2 Financial position Annexure B		Whether the company has to continuously make profit for the last 3 consecutive financial year.	Please refer the amendment Sl. No 6
120	Page 7	Section 3.2 - Terms of Execution of Work	The contract with the consultant will be for a period of 30 months. It is anticipated that all the tasks listed under scope and other required activities in the process of setting up the EDW will be completed within 25 months. However, the Bank, at its option may extend the consultancy for further period, depending on its requirements.	Bank is requested to clarify on what the period of extension may be. Is it one year extension, or a two year extension, etc? What will be the contract value of this extension, how will it be arrived at?	Please refer the amendment Sl. No 11

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121	Page 7	Section 3.2 - Terms of Execution of Work	The contract with the consultant will be for a period of 30 months. It is anticipated that all the tasks listed under scope and other required activities in the process of setting up the EDW will be completed within 25 months. However, the Bank, at its option may extend the consultancy for further period, depending on its requirements.	Bank is requested to clarify the scenario if due to any unforeseeable circumstances beyond the control of the consultant, the bank/Datawarehouse vendor extends the period beyond 30 months? What is the course of action that is proposed by the Bank.	
122	29	section 3.2	Others	the bank can at its option extend the consultancy for further periods. This should be subject to mutual agreement. In light of this, will bank consider having a scope change mechanism which covers such eventualities.	Please adhere to EOI terms.