**CHAMA CHA UZAZI NA MALEZI BORA TANZANIA**

**UMATI**



Terms of Reference for a Call Centre Consultant

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**Introduction**

**1.2 Background of Call Centre**

UMATI a family planning Association of Tanzania is an independent non-governmental organisation whose mission is to champion SRHR and provide information and services targeting the young and the underserved through its four key outcomes: advocating for the integration of SRHR in legal and policy frameworks; empowering youth and communities on their sexual and reproductive health and rights including Gender Based Violence; delivering quality integrated sexual and reproductive health services; and enhancing accountability and good governance for sustainability of the Association through strategic partnerships.

To support the above initiatives that operates a client call centre needs to be setup appropriately

What we are looking for:

We are seeking a Call Centre Establishment Consultant with significant experience delivering and / or supporting others to deliver state of the art not for profit call centres in Tanzania. Specifically, the partner will provide technical guidance and leadership on this exercise.

This client Call Center comprises of an Integrated call Redressed System providing a single platform for staff at UMATI to log, monitor and escalate the respective outbound /inbound calls. It will converge versatile mode of communication like Mobile, SMS, Email & Website to register, track, and resolve client requests and communications. It helps in collating clients thoughts and channelizing their problem solving.

This Call Center, being operated from the UMATI premises, will receive calls between 8: 00 AM to 06: 00 PM on different SRHR and GBV issues faced by the clients and translates the calls into the computer. The built-in intelligent system ensures that the calls are disposed by the use of ICT which automatically tracks and pursues the status of calls with the action taking authority. To dispose a particular complaint, only the concerned official can update the database either through return SMS, email or from the web portal. If no action is initiated by the concerned official, the ICT tool automatically escalates the complaint to the higher action taking authorities. It also has built in MIS for administrators to identify the performance of their Call center unit section and officers there in for taking preventive actions.

**1.2 Requirement**

UMATI is seeking a proposal to set-up and train end to end facilities of a Call Center. The requirement entails for handling calls through EPABX system, Head Phones, IVRS and CRM Software with call recording facilities which will be integrated to a web application for the Health Systems handling.

**2 Scope of Work**

The System Integrator (SI) /Vendor is expected to provide the following services under the scope of work for Setting-up, training and support for Call Center for a period of a year, same will be based on the performance.

The proposed Call Center shall be operated through an extensive open workspace for UMATI call center staff/volunteers, with work stations that include a computer for each agent, a telephone set/headset connected to a telecom switch, and one station supervisor. It will be independently operated or networked with additional centers, linked to a corporate computer network and LANs. UMATI will provide the adequate room space, network, internet & electricity, where the call center will be set up.

The scope of work for Vendor under this RFP is broadly defined below. The Vendor is required to deliver the following services;

1. Understand the current business processes and functions pertaining to the business that will need to be translated in system setup.
2. Complete setup of call center and design, size, deploy, train and support UMATI staff with the call center solution in an area included in the scope. This includes installation of all necessary furniture (table & chairs), hardware & software such as computers, PBX, CRM system, Ranks etc.
3. The implementation will consist of implementing the proposed call center as per the requirements of UMATI.
4. Network architecture at proposed call center should be devised and implemented considering UMATI guidelines & its clients’ convenience.
5. Integration of IVRS.
6. Process acquiring of Toll-Free line with special number for clients calls seeking health assistances. This includes consulting Telecommunication companies and other concerned Government authorities.
7. Support & Maintenance of the overall system solution for one year.
8. The Vendor must provide infrastructure that is vertically and horizontally scalable beyond the initial requirement of 4 seats.

**2.1 Operational Scope**

The operational scope is detailed out below: -

1. Call Center to be setup at UMATI will follow the per-seat model.
2. Initially, the Call Center will be operational throughout the window of operations. The operating window for Call Center shall be from 08 AM to 5 PM, 5 days a week (UMATI working hours) and the vendor should setup in the system agents (UMATI staff) to be available as requested during operations.
3. CALL CENTER shall not be operational on National holidays / Weekends.
4. If the requirement arises, UMATI shall increase or decrease of the number of seats for the agents.
5. Increase / Decrease of agents (UMATI staff) will be done at UMATI as per the following:

* Temporary increase (or increase during peak hours) shall mean increase for a limited period. It could be for a few months. It could also mean increase during peak hours in a day for any number of days.
* In case UMATI wishes to reduce/increase the number of agents, a review will be done and communication will set forth.
* Proper orientation should be done to ensure any incoming agent (UMATI staff) is appropriately trained to take over the roll.
* VENDOR will provide detailed operational manual and standard operational procedures for all agents. The Vendor and UMATI will review some parts of the manual to allow easy use to be setup in the system in place.

**2.2 Toll Free Number / Client Call number**

Vendor will process the acquiring of the toll free/Client number for operationalization of call center. This includes payments of the fees for the acquisition of the toll free/client number.

The tariff and the rental charges (toll free number and the telephone lines) negotiated with the Telecom Service Providers will be handled by UMATI.

The Vendor shall take the suggestion from UMATI before completion of setup with agreed Telecom Service Providers and actual requirements.

The toll free/client number shall be also used for outgoing calls to clients, for follow-ups, quality feedback, etc.

**2.3 Call Center Service**

While Vendor sets up system, the intention of this call client center should offer following service categories: -

* Counselling
* Referrals
* Monitoring & Evaluations
* Information Services
* Enquiry Services
* Request Services
* Periodic interaction

UMATI may add additional related or similar services to this list. Vendor will provide draft formal process manuals and call flow to handle all above requests

**2.4 Process Delivery**

Interfacing requirements to be assessed based on the service requirements of UMATI. UMATI expects the service provider (agent/UMATI staff) to ensure an end-to-end process delivery by entering caller details in the Call Center solution, generating a ticket number for each unique query which can be provided to the respective Doctor in charge or associated person as a link to pursue the query and bring it to its conclusion. The Vendor or System Integrator will make the above process possible during the setup.

UMATI expects that queries generated by the front end are pooled at the end of day to each relevant back-end sections of personnel/Units (quality, projects/health services) who resolve them and update the back end in order that the call center agents accessing the front end are aware of the query resolution.

**2.5 Integration of Software**

As part of the establishment of the CALL CENTER, the Vendor will customize and integrate the requirements of UMATI. These applications will include:

* Automatic Call Distribution
* Customer Relationship Management Application
* Computer Telephony Integration
* Recording Solution
* Web based call analytics application tool that may be provided.

The Vendor shall be responsible for customizing the eFax solution and integrate the IVRS as per the need.

The system should have following features after the integration.

* Call will be automatically routed to the free CCS call center supervisor.
* If all the CCS are busy, voice message will be played till the operator is free.
* Voice logging will be the part of the system.
* CLI will be displayed on the Screen.
* Caller history can be available from CRM
* Easy reporting facilities
* GUI based configuration interface
* Scalable (License pattern)
* All call logger reports should be available on the Call Center portal (as well as website) for officers and public view depending upon the access right.
* (j) Incoming call lines should be Increased

**2.6 Features of PBX Gateway**

The Gateway should have the facility of accepting PRI connection, more than 20 extensions as per the below mentioned features.

**2.6.1 ACD (Auto call Distribution)**

The ACD Key Features includes ANI/ DNIS based routing, managing multiple Queues, Welcome greeting message, Hold-on Music (User Defined), Office hours configuration, Compliant with standard PBX, Media Gateways & Phones, Different user defined reports, Web access facilitating remote agent login, Skill-based Call Routing, Wait time notification and integration with calendar & Voice logger. Also have the ACD Queues facilities.

**2.6.2 IVR (Level-3 Voice Messaging)**

Level-3 IVR should have Self-help service with Text to Speech and Automatic Speech Recognition, IVR Node Flow Designer with Scripting Capabilities, Multi-language Support, Email/SMS/Fax Integration, Customizable IVR prompts and Agent Greetings facility.

**2.6.3 Call Center Communicator**

The CCC should be GUI based. It includes Instant Messaging Client, Operator Panel, Conference Administration, pop-up agent workbench screen, Unified Customer Interface for call handling, Call disposition, Conferencing, N-way Call Transfer and Missed Call Alerts

**2.6.4 Real Time Agent Monitoring**

The Solution should be provided with facility of Barging, Listening and monitoring the calls.

**2.6.5 Voice Logger**

There should be provision of Pre-integrated Active Voice Logging, 100% Blind Recording, Multi-format Voice Recording, Automatic Compression and Archiving and Web-based Remote Access to Voice Logs. Facility for quick and easy retrieval of Voice file according to the calls made.

**2.6.6 Reporting Application**

It should have the provision of Generation of business-oriented comprehensive reports at Agent, Campaign, System and Resource levels, Real-time and Historical Data Analysis and Automatic Maintenance and Backup Management

**2.6.7 Supervisor Application**

There must be the facility of Supervision architecture on telephony, agent, dialer and lead performance, independent supervisor interfaces for Inbound & Outbound campaigns and Complete MIS management for device, voice log, services and systems.

**2.6.8 Voice Recording & Storage**

There should be the facility of taking backup of System, Agent, Queue, and Instant automatically with time interval. Graphical interface to maintain the storage location. UMATI will maintain the voice recording library as setup by the vendor. Incoming call recording facility to be implemented for further evaluation of complaints.

**2.6.9 CRM Module**

CRM integration with IVR & ACD should be facilitated to enable client profiling, Integration with any third-party database, CRM or tool for smooth and seamless functioning and having Web-Agent facility.

**2.6.10 Head Phones for CCS**

The Service provider will be facilitated with the Head Phones with advance features for the CCS. It should have the facility of Own Dial Pad, Volume Control, Flash Button, Tone/pulse dialling switch, Last Number Redial Button, Mute Button, Over-The-Head Noise-Cancelling Headset, Clear Sound quality, Extension Jack

**2.6.11 Call Centre Statistics**

The Proposed Solution can able to give Queues/Agents statistics and real time status, Inbound/Outbound Graphs, CSV and PDF Data Export and Windows, Mac, and Linux Desktop Applications support.

**2.7 Report Generation**

Suitable reporting software should be available in the PABX system, as part of the above-mentioned applications, to generate standard report formats for monitoring the performance of agents, IVRS, ACD etc. the Vendor setup portal for sharing reports so that the designated officers of UMATI are able to generate reports at UMATI. The key characteristics of the reports shall include:

* The reports should be in flexible report formats, in xls, txt or any other user-friendly structure including graphics depending on the request by UMATI from time to time
* Reports should also be available in web-enabled format & should be configurable to be mailed to a defined mailing list at defined interval/ period.

**2.8 Operations & Management Phase**

**2.8.1 Content Management**

Content creation and management is the backbone of any call center. The Vendor will advise /work together with UMATI staff as when called for on any created and validated scripts from the data for the purposes of facilitating the same to its agents (UMATI staff). These scripts shall be considered for real-time client interaction usage only after approval from respective Director. Content Management shall entail the following activities on the part of UMATI /Vendor works.

* **Content Creation:** Content creation refers to the conversion and transformation of the identified information and data in pre-defined formats. Once the data transfer is completed from the Directors end, this data shall be processed at Call Center level for conversion in pre-defined formats, usually in script form, which shall be utilized by Agents during service delivery to clients. During data processing, it shall be ensured by UMATI that sanctity of data is maintained and no change in data content is done.
* **Content Update & Modification:** UMATI must ensure periodic update of content. Any update intimated by the Director or Lead must be incorporated within 2 days of such intimation. UMATI must also ensure preparation of FAQs on the basis of frequent service requests experienced at Call Center. The same shall be incorporated in the content every 15 days.
* **Content Validation:** UMATI must ensure validation and formal vetting of scripts (including FAQs) generated and updated on the basis of content received from the Lead/Director /Supervisor before its use for real-time client interaction. The manner and frequency of validation shall be decided during discussions between UMATI staff. SI shall submit the script / content related to the services to the department by taking formal approval either through email / written communication.

**2.8.3 Call Management**

Call Centre will be accessible by the clients on the designated number and email address. The calls initiated from any phone number/ operator to the designated number shall land in the Call Center of UMATI. UMATI will be required to prepare the Standard Operating Procedures (SOP) for various call types received through various channels and for each service to be delivered from the Call Centre. The list of standard operating procedures to be prepared includes, but not limited to, the following:

* SOP for handling Voice, SMS &Email channels for both information & family planning requests
* SOP for call closure including follow-up with respective Doctors/Desks
* SOP, scripts and escalation matrix for each service to delivered through Call Center

**2.8.3.1 System Maintenance**

The Vendor shall be responsible for Call Center solution setup and infrastructure support maintenance during the maintenance phase which shall include;

* Annual Technical Support Services including application patch, updates and deployment
* Application Customization (including IVR Tree expansion)
* Annual Maintenance of IT Infrastructure and support systems (relating to Call Center)
* Helpdesk Management
* Preventive Maintenance Services
* Corrective Maintenance Services
* Configuration Maintenance Services
* Network Management Services
* Vendor Management Services

**2.8.3.2 Monitoring**

* After setup of the system a facility will be available for UMATI monitoring team, external & internal auditors to be inspecting the functioning of Call Center.
* Additionally, the system should have remotely monitor performance on all SLAs/KPIs and also of all the applications provided by the system i.e. real- time ACD statistics, calls in queue, number of agents logged in, number of agents abandoned answered calls, query of the call logs of a particular customer etc. by designated Call Center Coordinator or Call Center in-charge.

**2.8.4 Go-Live**

Go-Live refers the commissioning of the Call center and shall be accomplished when all Activities including:

* Training of Call Center Agents, IT personnel and Manager.
* Preparation and validation of content and scripts for all services of UMATI.
* Setting up (Installation, Testing & Commissioning) of hardware & software infrastructure

**2.9 Technical Infrastructure**

The Vendor will install all procured equipment as per stated technical specifications and as per scope of work.

The key features of this setup shall be:

* Vendor will provide all necessary IT Hardware like Digital Avaya PABX/Telephone, IP Desk Phones Networking etc. required for the solution as will be in the tender.
* Appropriate manpower should be made available for the configuration and maintenance of the CRM/IVR/CTI/Recording Solution during the setup phase.
* Vendor shall provide the backup and recovery, vendor management for the hardware maintenance, OS configuration, patch management for the OS and database in consultation with IT Department.

**3 Constituents of Call Center**

The selected bidder will provide a team of highly competent professionals to setup system as per the requirement & qualification stated above.

**4 UMATI Responsibilities**

* Provision of required room space & electricity for the Call Center Operation at UMATI premises. UMATI shall ensure that space should be adequate for the seating of each agent UMATI staff.
* Provision of Toll-Free Number
* Facilitating the entire process by making quick decisions
* Resolving escalated issues in time
* Participation in status review meeting (on need basis)

**5 Project Timeline**

The vendor will be required to provide a timeline for supply, setup of Avaya PBX and its accessories, training and commissioning that should not exceed a month.

**6 System Requirements**

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| --- | --- | --- | --- |
| **S/N** | **Item name** | **Specification/Description** | **Quantity** |
|  | Call center Table | Call Center Cubicles, With 4 seats | 1 |
|  | Agent Chair | 24/7 Ergonomic Call Center Chair | 4 |
|  | Agent Desktop Computer | Brand: HP All in one| Operating system: Windows 11 (Licensed /Pre-Installed) | Processor: Core i5 | RAM: 8GB | Storage: HDD/SSD 280GB or above | Ports / Slots: USB + HDMI I/O + RJ45 (LAN) | Touch | 720p Camera |with Internal Speaker | 4 |
|  | Computer Antivirus | Brand: Kaspersky Antivirus | Expiring date: 2024 or above | 4 |
|  | Microsoft office 2019 package | -Microsoft office 2019 professional plus | 4 |
|  | Wallboard TV | Samsung 108 cm (43 inches) Crystal 4K Pro Series Ultra HD Smart LED TV UA43AUE70AKLXL | 1 |
|  | Rack Cabinet | Rack Cabinet 12U 600\*600\*635mm, (W,D,H) | 1 |
|  | Toll Free Line (E1) | Connect to all existing Telecommunication network | 1 |
|  | Call Center Headsets | Call Center headsets (Plantronics HW251N SupraPlus Wideband Headset and Plantronics DA80 USB Audio Processor) | 4 |
|  | CRM | Customer Relationship Management Application for 4 Agents- Annual Subscription | 1 |
|  | IVR Recording | Professional Studio Recording for IVR Scripts per page | 2 |
|  | Reporting Module | Real time analysis, monitoring, Recording and Reporting; Queue metrics for 5 agents - Annual Subscription | 1 |
|  | Call Center Server | XORCOM CXE2019, CXE2000 Xorcom IP-PBX with Complete PBX – 8 FXO, 2U Case | 1 |
|  |  |  |  |

How to Apply.

Please submit a technical and financial proposal with the timeframe, reference of your previous similar work together with the pictures and reference details of the organisation/individuals where the work was undertaken. Together with this, kindly share your company profile

The submission deadline is 27th October 2023 1700hrs EAT.

Proposals should be submitted to **procurement@umati.or.tz** with subject line “Call Centre Consultant’