



EXPRESSION OF INTEREST

**PROCUREMENT AND IMPLEMENTATION OF A
DIGITAL CHAT BOT PLATFORM
FOR
AMREF FLYING DOCTORS**

AUGUST 2022



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Section 1: Invitation to Tender

1. AMREF Flying Doctors invites tenders from eligible service providers for the Expression of Interest in the procurement and implementation of a Digital Chat BoT platform for AMREF Flying Doctors.
2. A complete set of tender documents can be downloaded from the AMREF Flying Doctors website: <https://flydoc.org/tenders/> by interested bidders.
3. Completed Tender Documents for preliminary and technical requirements are to be sent to **afd.tender@flydoc.org**.
4. Tenders must be sent to the email address below not later than **Friday 9th September, 2022 at 12noon**.
5. Interested eligible bidders are also invited for a pre-bid conference to be held virtually on **Friday 26th August 2022** from **10am to 12noon**. To access the Link for registration for the pre-bid conference, log onto <https://forms.office.com/r/r9Sg2ft1Hf>



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Section 2: Background

AMREF Flying Doctors is looking to utilize a digital BoT platform as part its digital marketing strategy to grow the customer base and improve customer experience.

A BoT, short for robot, is a program that operates as an agent for a user or other program or to simulate a human activity. Bots are normally used to automate certain tasks, meaning they can run without specific instructions from humans. AMREF Flying Doctors use a bot to replace a repetitive task that a human would otherwise have to perform.

The digital BoT platform should be able to support the following functions:

1. Communicate with website visitors

This is one of the most useful and popular BoT actions. When prospective customers come to your site, they'll want answers about your products or services. If they can't find those answers, they may never come back. Helping these potential customers is a key priority, but may be difficult with a lean customer support or sales team.

2. Integrate bots with messaging platforms

The digital BoT should integrate to messaging platforms such as WhatsApp, Instagram and Facebook Messenger. This will enable faster response to customer queries and improve their experience.

3. Qualify leads

The platform should program sets of questions to find out where a customer is in the sales funnel. The bot handles the work of bringing the lead in and finding the right product or service for them. The same can be escalated to one of the sales representative to come in and close the deal.

4. Personalize the user experience

One way that BoTs get personalized is to provide "quizzes" or a series of questions. The BoT should evaluate the user profile and turn that into a personalized experience.

5. Integrate to Business Applications

The platform should integrate to AMREF Flying Doctors business applications such as the Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) systems.



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Section 3: Methodology

2.1 Work Plan

Bidders should provide a detailed bid response showing their interceded project approaches and work plan.

2.2 Design and Configuration of an Digital Chat BoT platform

The system should be able to integrate with the existing AMREF Flying Doctors business applications such as Microsoft Dynamics CRM and ERP.

2.3 Training

The bidder will be expected to;

- Train AMREF Flying Doctors ICT support staff, two sales reps, and two Developers staff in the following areas:
 - I. Use of the system
 - II. System server installation and configuration (for on-premise)
 - III. Chat BoT creation and customization
 - IV. Setup of integration to various systems.
 - V. Configuration of questions and responses.
- Technical Training manuals should be provided for trainees. The training will be staggered as per departments within the AMREF Flying Doctors IT team.

2.4 Implementation of Service Level Agreements and Service Contracts

Standard Information Technology Service Management dictates that a service level agreement for every service offered be provided for by the service provider and managed by the client. We therefore propose to introduce service level agreements with support escalation matrices for the service providers, case resolution times and credits for the client in cases of total outages of the systems over a specified period of time. We shall require one SLA agreement that covers the items below renewable after two years:

- Customer-centric support
- Availability of ICT support
- Upgrading system versions
- Integration and automation
- Any other support

Deliverables

1. Workplan

2. Digital Chat BoT Platform

- Use of the system
- System server installation and configuration (for on-premise)
- Chat BoT creation and customization
- Setup of integration to various systems.
- Configuration of questions and responses.
- Escalation Matrix



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3. System Integration

- Ability to integrate with an existing ERP and CRM (Microsoft Dynamics) using connectors or any other proposed mechanism.
- Ability to interpret payloads from external data sources such as mobile channels, web portals, WhatsApp Bots e.t.c.

4. Training

- Training of AMREF Flying Doctors staff, support staff, system administrators and ICT staff
- Training program provided
- Training materials provided

5. Service level agreements and service contracts

- SLA agreement effected and operational.

Timelines

- a) The project completion should be valid for a period of **ninety (90) days** from the date of issue of award letter but can be extended if the bidder would not have completed the work in the specified period due to some unforeseen circumstances agreed upon by AMREF Flying Doctors and The bidder.
- b) Bidders shall provide a detailed bid response showing their intended project approach and work plan.

Project Plan

- a) The bidder shall provide a detailed work plan on the intended activities for the duration of the consultancy
- b) The system development consultant and AMREF Flying Doctors shall work together to ensure the successful installation of the ESB.

Section 4: Conditions to Tender

4.1 Definitions

4.1.1 In this Contract, the following terms shall be interpreted as indicated: -

- a) The Procuring entity” means the organization purchasing the service/goods.
- b) The Tenderer’ means the individual or firm supplying the Goods/services under this Contract

4.2 Application

4.2.1 These General Conditions shall apply in all Contracts made by the Procuring entity for the implementation of the Digital Chat BoT platform.

4.3 Standards



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4.3.1 The services /goods supplied under this Contract shall conform to the standards mentioned in the Technical Specifications

4.4 Use of Contract Documents and Information

- 4.4.1 The tenderer shall not, without the Procuring entity's prior written consent, disclose the Contract, or any provision therefore, or any specification, plan, drawing, pattern, sample, or information furnished by or on behalf of the Procuring entity in connection therewith, to any person other than a person employed by the tenderer in the performance of the Contract.
- 4.4.2 The tenderer shall not, without the Procuring entity's prior written consent, make use of any document or information enumerated in paragraph 3.4.1 above
- 4.4.3 Any document, other than the Contract itself, enumerated in paragraph 3.4.1 shall remain the property of the Procuring entity and shall be returned (all copies) to the Procuring entity on completion of the Tenderer's performance under the Contract if so required by the Procuring entity

4.5 Patent Rights

- 4.5.1 The tenderer shall indemnify the Procuring entity against all third-party claims of Infringement of patent, trademark, or industrial design rights arising from use of the Goods or any part thereof in the Procuring entity's country

4.6 Project Timelines

- 4.6.1 The successful bidder shall be expected to undertake the project within the time agreed in the contract.

4.7 Special Instructions

- 4.7.1 The final tender document should be bound together as one document.
- 4.7.2 The final bound tender document must be serially paginated (All pages in the document from top page (immediately after top cover) to the last page (one before back cover) including table of content, separators, brochures and any other attachments) in a continuous ascending order from the first page to the last in this format; 1,2,3.....n where n is the last page.

Section 5: Service Level Agreements (SLAs) and Service Contracts

5.1 Standard Information Technology Service Management dictates that a service level agreement for every service offered be provided for by the service provider and managed by the client. Tenderers must indicate the expected SLA agreements and the annual costs including any subscription costs.

- 5.1.1 There shall be service level agreements with support escalation matrices for the service providers, case resolution times and credits for the client in cases of total outages of the systems over a specified period of time.

Section 6: Evaluation Criteria

Interested bidders are requested to respond with the following details:

1. The proposed software
2. Estimated cost of acquisition including the licensing model



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3. Draft implementation plan/timeframe
4. Post-implementation Support structure

In addition, eligible bidders should provide the mandatory requirements tabled below:

A: Preliminary Evaluation Criteria

MANDATORY REQUIREMENTS		MAX SCORE	SCORE	COMMENT /REMARKS
1.	Copy of Certificate of Incorporation/Certificate of Registration	1 OR 0		
2.	Copy of valid KRA Tax Compliance certificate	1 OR 0		
3.	Must attach the company profile with a brief history about the company/ organization including senior management structure	1 OR 0		
4.	Must submit copies of 3 audited financial reports (2019, 2020 and 2021) and each must be signed and dated by the auditor and the firm's Directors	1 OR 0		
5.	Must provide complete certified bank statements for the following 3 months (May 2022 – July 2022) signed and stamped by the bank on every page	1 OR 0		
6.	Job references for similar assignments your company has undertaken for institutions within or outside Kenya within the last three years – from 2019 to date (attach LPOs, appointment letters/contracts for the consultancies) in a multi country setup.	2 OR 0		
7.	Must provide a copy of relevant government registration/trading license relevant to this tender	1 OR 0		
8.	Must attach a recent client/Customer referral letter (from 2019 to date)	1 OR 0		
9.	Must attach at least 3 CVs for the organization's lead consultants	1 OR 0		
TOTAL SCORE (RESPONSIVE OR NON-RESPONSIVE)		10MKS		

Note: Bids missing any of the above mandatory requirements numbered 1 to 10 will be considered as non-responsive bid and shall not proceed to the technical evaluation stage.

B: Technical evaluation criteria

TECHNICAL REQUIREMENTS		SCORE	COMMENT/REMARKS
1.	<p>The proposed platform should</p> <ol style="list-style-type: none"> 1. Communicate with website visitors 2. Integrate bots with messaging platforms 3. Qualify leads 4. Personalize the user experience 5. Integrate to Business Applications 		



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	TECHNICAL REQUIREMENTS	SCORE	COMMENT/REMARKS
	(max 20mks)		
2.	The platform should provide a secure integration to internal business applications (max 10mks)		
3.	Timeframe a. Over 1 year (0mks) b. Less than 1 year (5mks) c. Less than 6 months (10mks) <div style="text-align: right;">(max 10mks)</div>		
4.	Milestones a. Business requirements (5mk) b. Customization (5mk) c. Testing (5mk) d. Training (5mk) e. Going live (5mk) <div style="text-align: right;">(max 25mks)</div>		
5.	Post-implementation Support structure a. Local (20mks) b. International/Remote (10mk) <div style="text-align: right;">(max 20mks)</div>		
6.	Vendor accreditation (5mk)		
	TOTAL SCORE	/90	
	TO BE INDICATED BUT NOT RATED		
7.	Estimated cost of acquisition including the licensing model and implementation		
8.	Estimated cost of customization, testing, training and data conversion/ migration.		
9.	Post-implementation Support structure		

Note: Bidders who score below 70% in the Technical requirement will be considered as non-response and therefore will be eliminated at this stage

Section 7: Submission Guidelines

Application guidelines are available in the following website: <https://flydoc.org/tenders/>.

Proposals should be sent via email to afd.tender@flydoc.org by **Friday 9th September, 2022**.