Request for Proposal (RFP)

IP-Based Tele-calling Platform with Zoho CRM Integration

Project / Programme Name   **: Fund Development & Communications**

Publish Date   **: 20 January 2025**

Procurement Method   **: Open Tender**

Last date of submission   **: 27 January 2025**

Purpose: We seek an IP-based outbound tele-calling solution with seamless integration with Zoho CRM to enhance our domestic Tele-calling operations. The solution must comply with all domestic telecommunications regulations in Bangladesh. This document outlines our essential requirements for an IP-based tele-calling platform integrated with Zoho CRM. We look forward to receiving proposals that meet or exceed these specifications.

Platform Capabilities:

1. **Zoho CRM Integration:**
   - The Tele-calling platform must enable our agents to initiate calls directly from within Zoho CRM or via a domestically hosted CRM.
   - Lead, contact, deals, and calls modules of Zoho CRM should sync in real-time with domestically hosted CRM.
2. **Real-Time Data Sync:**
   - The solution should eliminate the need for manual database uploads or synchronization with the telecalling platform.
   - All call-related metadata should be automatically and instantaneously synced with Zoho CRM via APIs, including but not limited to:
     - Call Duration
     - Call Start and End Times
     - System-Generated Call Responses (e.g., Invalid Number, Out of Reach, Not Working, Cannot Connect, Answered, Ringing But Not Answered)
     - Call Recording Links

Outbound IVRS Capabilities:

- The platform should support outbound Interactive Voice Response System (IVRS) capabilities, which can be automated and triggered by workflows within Zoho CRM.

- The IVRS should enable features such as outbound call broadcasts with options for lead qualification, e.g., "Dear [Name], this is SOS Children's Villages. You recently participated in our fundraising survey. Would you like to speak with a donation counselor? Press 1 for Yes, 2 for No.

Scope of work:

1. **Zoho CRM Integration**
- Agents will utilize Zoho CRM to manage customer interactions.
- Call initiation and record synchronization will be automated via APIs.
2. **API Hosting**
- APIs will be hosted securely on agency's premises.
- Communication between Zoho CRM and the call center system will use industry-standard protocols for security and reliability.
3. **Call Workflow**
- Call Generation: Agents initiate a call from Zoho CRM by triggering an API hosted in agency.
- Call Completion: After the call, the caller module triggers a Zoho CRM API to transfer the call record with call record information back into the CRM system.

Technical Details:

1. **Infrastructure Requirements:**
   - Hosting Environment: Secure server environment in agency's premises.
   - Security: SSL/TLS encryption for API communications.
2. **Integration Requirements:**
   - Zoho CRM API keys for authentication.
   - Configuration of webhook URLs in Zoho CRM for seamless integration.

Security features:

API security is crucial to protect sensitive data, prevent unauthorized access, and ensure system integrity. Here are key security features and best practices for APIs:

API Keys: Unique identifiers for clients (less secure, suitable for non-sensitive data). HTTPS (TLS): Encrypts data between the client and server.

End-to-End Encryption: Ensures data remains encrypted throughout the transfer process.

API Keys expiry: Tokens expire after a defined period, reducing exposure in case of compromise.

Call Generation:

● Agent's soft dialer or a physical phone set will be connected to the call server as an audio (in & out) terminal.

● Agent will request on the CRM web portal to call a destination number.

● CRM will send a call request to the call server with the agent ID and destination number.

● Call server will get the agent ID (agent's dialer/ phone set) first and then

● Call server will initiate the call to the external destination through the carrier (IPTSP)

● The call server will preserve the call history (call log, call recording). After the call-hang-up, the call server will update the CRM.

Testing:

- Perform end-to-end testing of CRM integration, call metadata sync, and IVRS functionality.
- Validate compliance with domestic telecom regulations. User Training and Documentation:
- Train agents and admins on using the platform. o Provide user manuals for day-to-day operations.

Go-Live and Support:

- Launch the platform and monitor initial performance.
- Offer ongoing support and address any post-launch issues.

Implementation Timeline:

- Requirement Gathering and Design: 1 Week
- API Development and Hosting: 2 Weeks
- Call module development: 3 Weeks o Zoho CRM Integration: 1 Week
- Testing and Validation: 1 Week o Deployment and Training: 1 Week
- Total Duration: 9

Weeks Server configuration:

● vCPU: 4 core

● RAM: 8 GB

● Hard disk: 200 GB SSD

<u>**Vendor Eligibility Criteria**</u>
1. **Experience and Expertise**
   o Minimum 3 years of experience in IP Telephony services.
   o Proven expertise in CRM and Telephony integration.
   o Experience with Zoho CRM management.

Terms & Conditions:

a) Quotation to be submitted to our **National Office, SOS Children's Village International in Bangladesh, 01 Shamoli, Mirpur Road, Dhaka** or through email: _national.office@sos-bangladesh.org_   on or before 27 January 2025.

b) Delivery Place: Dhaka (above-mentioned address)

c) Inspection: The concerned Inspection revisit will be carried out before delivering the products (if needed).

d) Offer Validity: 30 days from the date of submission.

e) Quantity/requirement may change during the final order after mutual agreement

f) SOS reserves the right to cancel this process at any time.

g) Payment: Payment will be made by crossed cheque/ Bank Transfer after satisfactory delivery and a notation on the delivery challan by the recipient (with name, designation & date).

h) Necessary VAT & TDS will be deducted from the bill as per government rules.

For any clarification:
SOS Children's Village International in Bangladesh
Mr. Rashal Mia, Cell: 01919 151520
Phone: 09609500500, +880258152350 (Sunday to Thursday, during office time)