Invitation for Expression of Interest in Provision of Rental service on Hotline Management System for "Building Maintenance Assistance Schemes Hotline (BMASH)" ("the Services")

The Urban Renewal Authority (the Authority) is implementing a one-stop hotline service, namely Building Maintenance Assistance Schemes Hotline (BMASH) to answer public enquiries in relation to the building maintenance assistance schemes provided by the Authority, e.g. the joining criteria, details of subsidies / loans etc. The Authority intends to engage a service provider ("Provider") to provide a rental service on hotline management system which comprises of a customer relationship management (CRM) system and a telephone system for a service period of **2** years ("the Services Period").

The scope of services ("the Services") to be carried by the Provider includes the following:

General requirement:

(a) **Rental service on providing telephone system and Customer Relationship Management (CRM) system**

- Contract period: 2 year
- Payment term: Annual payment
- Number of host/agents: Total 5 agents (including at least 1 administrator account)
- Service provided by vendor should be legal and licensed, no software and hardware will be provided by Urban Renewal Authority (URA). The system should be self-sustainable without incorporating to the IT system of URA
- Service Hour: 7days x 24hours
- CRM Service level: minimum 99.9% uptime guarantee, i.e. less than 3 hours/year
- Telephone system Service level: 99% uptime guarantee, i.e. less than 1 hour/year

(b) Ownership of Customer Relationship Management (CRM) system:
- All data ownership belongs to URA. Service provider requires to provide all data back to URA after the contract end in softcopy without additional charge
- All parties should undertake to keep all information / data to be confidential

(c) One-off training:
- To provide sufficient training sessions / hours for operators

Telephone system requirement:	
1.	**Basic requirement**
	IP phone system To provide Full IP phone based technology with "SIP Trunk" ▪ To provide "SIP Trunk" and other required software and hardware ▪ Physical IP Telephone sets (Hard Phone) are required and shall be installed at URA office ▪ The system should be self-sustainable without incorporating to URA telephone system and / or any additional equipment to be installed **Support & Maintenance** ▪ Customer Service supports (by telephone or email) are required for the following operation hours (Mon to Fri from 9:00am to 6:00pm (public holiday excluded) ▪ Incident response: within 15 minutes ▪ Problem resolve time: within 30 minutes from call received ▪ Warranty should be included for all hardware used in the system ▪ Provide at least 10 on-site support hours
2.	**Feature requirement:**
	The telephone should include the following functions: ▪ Unlimited voice mail box *(2.1)* ▪ All the voice records could be downloaded and saved to the external storage devices *(2.2)* ▪ Full-time Voice/Conversation Recording on hard phone *(2.2)* ▪ Automatic Call Distribution (ACD) *(2.3)* ▪ Integration with CRM system *(2.4)* ▪ Play the recorded disclaimer *(2.5)* ▪ Call Hold (Music-on-hold) ▪ Call Transfer (Unattended / Attended) ▪ Call Forwarding (All / No Answer / Busy) ▪ Call Waiting
2.1	**Voicemail System requirement** ▪ Unlimited voice mail box ▪ The system shall provide alert function for operators to respond to voice mails that have been stored in the system. ▪ Allowing replay voice mails from the desk phones, system administration interface, and save selected voice mails to internal or external storage devices.
2.2	**Voice Recording System Requirement** ▪ The Voice Recording System shall provide 100% voice recording capability of all conversation including all incoming calls, outgoing calls, internal calls and transfer calls. There is no interruption between channels, or any bad impact on sound quality when recording. All voice log records shall be retained for at least 12 months. ▪ The system can replay conversations from the user-friendly software/web-based interface, and save selected conversations to internal or external storage devices. ▪ The Voice Recording System shall search the voice data by different criteria (such as date, time and operators' login id). ▪ The system shall provide access security control function; voice recording retrieval should be accessible by authorized users only.

2.3	**Automatic Call Distribution (ACD) System requirement**
	- Methods of call distribution to Agents of the Hotline Service Center includes - Ring All - Ring all available agents until one answers - Round Robin - Take turns ringing each available agent - Random - Ring a random agent - The Telephone System can switch to a specified mode automatically according to pre-defined schedules. Callers will hear a recorded announcement or caller can select to leave a message for return call. More than one pre-defined message should be supported, includes but not limited to the following purposes: - Non-Operation hours - Public Holidays - Typhoon Signal Hoisted - Rainstorm Black Signal Hoisted - Automatic Call Distribution and Call Statistics reports showing all the calls details should be provided. - All reports shall be retained for at least 12 months by the system and exportable to Excel compatible format.
2.4	**CRM integration requirement**
	- The Telephone System shall be able to integrate with the Customer Relationship Management (CRM) system. - The IP phone shall display the telephone number of the caller for identification of the caller. Once the caller's telephone number matches with the database of the CRM, a screen of relevant caller information pops up. - The CRM integration pop-up screen shall capture the updated callers' information from the database of the CRM, a button shall be provided for the operators to open the full profile of the callers' information. - The CRM integration pop-up screen shall able to be customized on request, for example, adding fields to show more info from CRM database or / and input box for user to enter information and save to CRM database. - The Telephone System shall provide a platform to identify the telephone numbers of all answered and completed incoming, outgoing, internal and transferred calls. - The Telephone System shall provide a platform to identify the telephone numbers of all unanswered and abandoned incoming, outgoing, internal and transferred calls.
2.5	**Disclaimer**
	- The system should able to play the recorded disclaimer once received the call - Allow the operators to update the pre-recorded disclaimer message / greetings (in English and Chinese) remotely through user-friendly software / web-based interface and able to amend freely with no additional cost involved

Customer Relationship Management (CRM system)	
1.	**Basic requirement**
	Customer Relationship Management (CRM system) CRM system for storage all incoming enquiries, e.g. the joining criteria, details of subsidies, make referral etc. and generate the reports - System can handle both English and Chinese input and enquiry - URA is using the Microsoft Dynamics (cloud version) with 5 CRM licensed accounts. - For contract to be awarded with a service period of 2 years, the service provider could provide Microsoft Dynamics CRM or other CRM system. - For service provider suggests to use Microsoft Dynamics, the service provider should be responsible for updating the system account and billing information, also transferring all customized contact forms & phone activity forms, workflow, data, installed software and standard reports etc. - For service provider suggests to use other CRM system (other than Microsoft Dynamics), the contract price should be included with the costs for customization (*Please refer to the specified format at Annex I*), data migration (*around 33,000 call data which exported in Excel format*) and server for data storage etc. - Upon the contract end, the service provider should be responsible for updating the system account such as billing information, to transfer the CRM account ownership to the URA, including all customized contact forms & phone activity forms, workflow, data, installed software, and standard reports etc., without any additional cost. **Support** - Customer Service supports (by telephone or email) are required for the following operation hours (Mon to Fri from 9:00am to 6:00pm (public holiday excluded) - Incident response: within 15 minutes - Problem resolve time: within 30 minutes from call received - Include support hours for services breakdown and/or any necessary upgrading to latest version which including any configuration to all other related software / systems - Include at least 10 support hours for customization - The deduction on support hours should be based on the actual time used and the prior approval from URA should be sought
2.	**Feature requirement:**
	- System can handle both English and Chinese input and enquiry - The CRM should be customized by adding the field(s) - Function to record incoming call case details include, but not limited to: (1) Caller's name (2) Caller's phone number (3) Caller's identity (user select and configurable in system) (4) Address, e.g. Street Name, Building Name, Floor, block, Flat, District, Area etc. (5) Types of the enquiry (6) Relevant scheme enquired (user select and configurable in system). (7) Responsible parties for the call (user select and configurable in system). (8) Content of the enquiry with the operator (9) Log operator ID (10) Log date and time (11) Activities taken in the log date and time (follow up history)

	CRM system integration with the telephone system ▪ System is able to identify the repeated callers automatically by searching their names and telephone number and alert the operators. ▪ System should integrate with the telephone system and pop up the data input form for real time data entry upon call-in.
	Data Storage ▪ All data is required to store in a security environment and able to be exported in Excel format. ▪ Server for data storage should be provided.
	Report ▪ Generate the reports at the required format (set up the standard reports during initial customization). ▪ The CRM should create different tailor-made reports

The Authority is short-listing suitable Provider satisfying the above-mentioned criteria for quotation seeking for the Services.

For interested service providers, please duly complete and submit **the reply form in Appendix A together with all the required information** for the attention of Mr. Alan Lui, Manager, Building Rehabilitation Division **at the Authority's office, Unit 1001, 10/F, Tower 2, Cheung Sha Wan Plaza, 833 Cheung Sha Wan Road, Kowloon by 12:00 noon, 21 March 2019**.

Should you have any queries, please contact Ms. Bobo Tang at 2588 2644.

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To: Urban Renewal Authority ("the Authority")

□ We are interested in submitting a quotation for the above Services and submit herewith the completed **Appendix A and required information** for your consideration.

□ We are **NOT** interested in submitting a quotation for the above Services.

Note: Please tick the appropriate box above.

We understand that the Authority is under no obligation to invite any company which has submitted an expression of interest to submit a quotation. We also acknowledge that the Authority reserves the right to cancel this expression of interest exercise and/or the tender exercise at any time without prior notification and without giving any reasons at the Authority's absolute discretion. In submitting this reply form, we acknowledge and agree with all the terms contained in the invitation. The information on our company is set out below:

Part A. Particulars of the Company	
Full Name of the Company	
Year in which the Company was established	
Registered Address	
Contact	(Tel)_____ (Fax) _____ (email)_____
Contact Person and Position	
Please provide the following document and put a tick in the box:-	
☐	Copy of the valid Company's Business Registration Certificate
☐	At least 1 job reference is attached

The above information is certified true, correct and complete by:
For and on behalf of the Company

_____
Authorized Signature with company chop   Date : _____

Full Name & Title of the Authorized Signatory: _____