

Request for EOI for Appointment of Consultant for CRM and EDW - Amendments - Annexure 2

Amendment Sl. No	EOI Page No	EOI Clause Reference / Point / Section #	As per EOI	Amended EOI
1	4	2. Eligibility Criteria, Sl. No 3	<p><u>Criteria</u> 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</p> <p><u>Documents Submitted as a proof / declaration</u> Certificate from bank / financial organization where they have implemented EDW (including CRM is a plus)</p>	<p><u>Criteria</u> 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 in India.</p> <p><u>Documents Submitted as a proof / declaration</u> Certificate from bank / financial organization where they have implemented EDW and CRM</p>
2	15	4.21 Evaluation Metrics Sl. No . 4	<p><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.</p>	No. of **large banks/financial organizations to which the consultant has provided consultancy services on EDW during the last 5 years

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3	17, 18	<p><u>4.22 Milestones</u></p>	<p><u>Milestones Points for payment releases</u> <u>Milestone point 4</u> § Assist the bank in getting the architecture, system Requirement specifications and the workflow of the implementation for our bank by the proposed SI / Vendor. § Helping the Bank in benchmarking the Hardware and Software as well as in Installation and configuration. § Data extraction and loading using ETL from all the sources and it should support the Middleware components. § Defining UAT plan and methodology. Reviewing the UAT results and suggests corrective measures. Assist bank in the User Acceptance Sign off. § Assisting the bank in End to End implementation of the EDW and BI. § Manage the project and monitor the implementation stage by stage and ensure successful implementation of the project. § To draw a training plan based on the solution requirements</p>	<p><u>Milestones Points for payment releases</u> <u>Milestone 4</u> § Assist the bank in getting the architecture, system Requirement specifications and the workflow of the implementation for our bank by the proposed SI / Vendor. § Helping the Bank in benchmarking the Hardware and Software as well as in Installation and configuration. § Data extraction and loading using ETL from all the sources and it should support the Middleware components. § Defining UAT plan and methodology. Reviewing the UAT results and suggests corrective measures. Assist bank in the User Acceptance Sign off. <u>Milestone 5</u> § Assisting the bank in End to End implementation of the EDW and BI. § Manage the project and monitor the implementation stage by stage and ensure successful implementation of the project. § To draw a training plan based on the solution requirements</p>

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4	17,18	4.22 Milestones	<u>Deliverables</u> <u>Milestone 4</u> Get the required document of proposed Architecture, SRS, Workflow from SI / Vendor UAT PlanProgress Report On monthly basis. Technical Document, Training plan, End User Manual.	<u>Deliverables</u> <u>Milestone 4</u> Get the required document of proposed Architecture, SRS, Workflow from SI / Vendor UAT PlanProgress Report On monthly basis. <u>Milestone 5</u> Technical Document , Training plan, End User Manual.
5	17,18	4.22 Milestones	<u>Time Line</u> <u>Milestone 4</u> 12 months	<u>Time Line</u> <u>Milestone 4</u> 8 months <u>Milestone 5</u> 4 months
6	4	2. Eligibility Criteria	-	Additions : <u>sl. No: 7 Criteria</u> The company should have made profit continuously for the last 3 financial years. <u>Documents Submitted as a proof / declaration</u> As per 5.2 Annexure B : Financial Position

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7	16	4.22 Milestones	<p><u>Milestones Points for payment releases</u> <u>Milestone point 1</u> § Requirement Study for EDW and CRM with all our strategic heads / teams and outlining the architecture and functionalities required for Enterprise Data Warehouse along with Data cleaning and Data integration tools. § Defining the Enterprise wide Data warehouse architecture. § Identification of a suitable EDW and Business Intelligence solution. § Defining the Network architecture § Defining the EDW security architecture § Preparing the RFP for procurement of the Data Cleaning and Data integration tools, EDW & BI solutions etc</p>	<p><u>Milestones Points for payment releases</u> <u>Milestone point 1</u> § Requirement Study for EDW and CRM with all our strategic heads / teams and outlining the architecture and functionalities required for Enterprise Data Warehouse along with Data cleaning and Data integration tools. § Defining the Enterprise wide Data warehouse architecture. § Identification of a suitable EDW and Business Intelligence solution. § Defining the Network architecture § Defining the EDW security architecture § <u>Evaluate the existing CRM in bank and its implementation.</u> § Preparing the RFP for procurement of the Data Cleaning and Data integration tools, EDW & BI solutions, ACRM etc</p>

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8	16,17	4.22 Milestones	<p><u>Milestones Points for payment releases</u> <u>Milestone point 2</u> § Evaluate the data cleaning to be done with in-house or with the proposals from vendors. § Assist the bank for a suitable solution. § <u>Evaluate the existing CRM in bank and its implementation.</u></p>	<p><u>Milestones Points for payment releases</u> <u>Milestone point 2</u> § Evaluate the data cleaning to be done with in-house or with the proposals from vendors. § Assist the bank for a suitable solution.</p>
9	19	4.24 Order Cancellation and Liquidated Damages	<p>If the consultant fails to complete the assignment as per the time lines prescribed in the EOI and the extensions if any allowed, it will be a 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.</p>	<p>If the consultant fails to complete the assignment as per the time lines prescribed in the EOI and the extensions if any allowed, it will be a breach of contract. Bank shall recover 0.25 % of the total Cost of the Project (ie., Consultancy Fee) as Liquidated Damages for each week of delay or part thereof, if the selected Consultant does not comply with the timelines specified. The recovery shall be made out of the payments due to the Consultant. LD is applicable where the delay /non adherence due to sole reasons attributable to the Bidder up to a maximum deduction of 10% of order value. Once the maximum is reached, the Purchaser may consider termination of the contract. However the final decision in this regard lies with the bank.</p>

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10	New Addition	4.26 Indemnity Clause	-	The bidder shall indemnify, protect and save the Bank against all claims, losses, costs, damages, expenses, action suits and other proceedings, resulting from infringement of any law pertaining to patent, trademarks, copyrights etc. or such other statutory infringements in respect of the Consultancy Services provided by the bidder
11	7	3.2 Terms of Execution of Work	However, the Bank, at its option may extend the consultancy for further period, depending on its requirements.	However, the Bank, at its option may extend the consultancy for further period, depending on its requirements. The period of extension, in case of delay which is not attributable by the consultant, will be decided on mutual agreement with the consultant at the same terms and conditions. However the final decision in this regard lies with the bank.
12	4	3.4 Restrictions	The selected consultant will not be able to participate in the RFP process for procurement of EDW of the Bank	The selected consultant will not be able to participate in the RFP process for procurement of Hardware / Software for EDW of the Bank. The consultant (for EOI) should not have been blacklisted by any state government/central government/ PSU entity in the past. If this is the case, such consultant/bidder stand disqualified automatically.