



**SAFARICOM PLC
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**EXPRESSION OF INTEREST – CO CREATION OF A PARTNER MANAGEMENT & TRADE
AUTOMATION SOLUTION.**

Document Release Date: 8th AUGUST 2023

Last Date for Receipt of Proposals: 16th AUGUST 2023 15:00PM EAT

ACCRONYMS

SFE - Salesforce effectiveness

MPESA – Mobile money

FTTX – Fiber to the home and business

SME – Small and medium enterprises

LMM – Mobile device loan

SSO – Sim selling outlets.

Table of Contents

ACCRONYMS.....2

1.0 INTRODUCTION.....4

2.0 AIMS AND OBJECTIVES.....4

3.0 SUBMISSION OF ENQUIRIES AND RESPONSES8

4.0 EOI Requirements for the bidders.....8

5.0 INSTRUCTIONS TO RESPONDENTS..... 10

6.0 NEXT STEPS 10

7.0 NOTE..... 11

Appendix 1: Information on staff and organization experience..... 12

1.0 INTRODUCTION

Safaricom PLC is the leading integrated communication and financial services provider in Kenya, with a steadily growing subscriber base, SME customers and distribution partners. The company is continuously expanding and reviewing its business, to meet the changing competitive landscapes, needs, and profiles of its customers. Our efforts are geared towards positively impacting the lives of those in the communities around us and thus we strive to change the present to improve the future.

The company has dynamic operations running within the direct and indirect channels of the business, resulting to the need of digitizing and automating our trade operational processes, drive simplification, efficiency and flexibility to easily adopt to the dynamic operational environment and provide better visibility for both internal and partners reporting needs gaining a competitive edge of the business. To achieve this, we are seeking an automation partner who will support in the creation of the solution.

2.0 AIMS AND OBJECTIVES

This Expression of Interest (EOI) is intended to identify an experienced and reputable solutions provider who will jointly develop with Safaricom PLC a solution that will facilitate Partners management and SFE automation, with the **IP proprietary rights** being a Safaricom's vest. The supplier will be tasked to jointly (with SFC) design, building, support and manage the solution in line with the industry's best practice.

The interested companies who express interest in co-creating this solution MUST have a demonstrable capacity and experience in designing, building, testing, commissioning, supporting & maintaining a dynamic Partner management, distribution, and sales force effectiveness system. In this regard, the solution MUST have the capabilities below.

Requirement ID	Requirement Statement	Must Have/ Good to Have
FR001	Partner back-office operations: Solution should enable our partners have a clear visualization of their business by having the ability to view; Customer's feedback & Escalations raised till resolution, aggregated prospects and leads, Products portfolio listing & pricing, Customer base/ sales agents universe, Distribution/ touchpoints location mapping, Fiber rollout progress and daily SFC physical stock holding for optimal purchasing & monetization plannings.	Must Have
FR002	Partner back-office operations: Solution to enable our partners run efficient and seamless business operations by having the ability to: Place purchase orders, Serially manage Inventory, Carry out stock transfers and periodic stock takes, Perform end of day sales agents reconciliations, Initiate reverse logistics with a status view till reimbursement, Mitigate revenue loss through	Must Have

	lost stocks blocking, Commissions and payments processing, book keeping – Journal entries and P&L generation.	
FR003	Sales Force prospects & Leads management: The solution should enable frontline sales teams offer better services at to the customers by having the ability to: carrying out nonphysical products prospecting & initiating respective approval process workflows, view aggregated prospects, opportunities and leads in their respective universe, Leads processing/conversion to sales and collect sales orders.	Must Have
FR004	Sales Force sales and sales enablement: Solution to enable the front-line teams win at each stage of customer engagement by having the ability to: Generate and execute service plans/ JPs, virtually manage own inventory, conduct structured customer visits through defined steps of a call with geo tags, view and process leads/ opportunities at customer level, In trade stock holding view, Carry out sales and assigned sales activities, manage Trade assets within their universe, carry out trade visibility initiatives and respective compliance measures, Create and maintain retail customer universe, set and view sales targets at branch/ user level, Conduct capability building through curriculum development & coaching, detect and flag fraudulent transactions.	Must Have
FR005	Customer base: Solution to enable our partners have a real time visibility of their business revenue streams by visualizing the active, potential churn and churned customers across the various categories ie GSM/FFTX/ 4G/ 5G, SSO, Retail outlets and the agent network – including location mapping, geo / channels hierarchy.	Must Have
FR006	Commissions, reporting and performance management: Solution to provide a holistic approach to business performance aligning resources to meet strategic business needs through transactions related reporting on: <ul style="list-style-type: none"> • Partner Commissions and incentives generation and payments processing. • Aging report – Report provides inventory age identified by its receipt date. • Purchase Order Fulfilment report – Report details a summary of orders placed, processed, received orders and returns to the principal. • Inventory holding & Journals summary – Report visualizes inventory management related transactional activities and process at warehouse levels. • Sales targets vs achievement - Report comprehensively shows all sales activities and processes over a period of time, factoring in the targets and achievements across the entire product portfolio. • Acquisition targets vs achievement – Report provides a detailed and summarized view of acquisition efforts in trade against respective acquisition targets. 	Must Have

	<ul style="list-style-type: none"> • LMM real time payments – Reporting on device loan payments • Curriculum progression & benefits realization – Report provides a view of capability development initiatives and resulting benefits realization outputs at defined user levels. • Dashboarding – Provides insights visualization and clarity at user / customer level, by transforming data from varied data sources to insight that are easily understood by users. • Gamification and Leaders board – Motivates peer to peer engagement and coaching through the application of typical game playing elements to areas of activity/ KPIs triggering better performance. • Call Performance – Report provides details of the go to market processes and behavioral aspect of the sales agents. 	
FR007	<p>Governance: Solution to enable our partners define a framework of policies and guidelines to facilitate accountability, transparency and responsibility in the organization through: user roles definition and management, retail credit terms and limits management, Customer visits geo tagging and tracking, End of trading day/period reconciliation and lead time definition, P&L components definition, Retail outlets/ Agents universe/ SSOs universe data maintenance & relocation/ remapping and Systems audits generation.</p>	Must Have
TFR008	<p>Cloud Native: The system must be Cloud Native to be able to run on Google Cloud, AWS, Azure and OpenShift. No direct Hardware support.</p>	Must Have
TFR009	<p>API First: Application to expose functionality through secure REST APIs.</p>	Must Have
TFR010	<p>Agile Co-Creation: The Delivery Approach adopted by Safaricom is Agile with very clear deliverables every Sprint (2-3 weeks). The Vendor must use Agile delivery and incorporate Safaricom teams in the Delivery co-creation</p>	Must Have
TFR011	<p>Always Secure: Applications to be built to conform to all security standards including encryption of all PII data, GDPR Compliance, Customer Data Privacy Laws compliance, have capability for regular patching e.g. of OpenJDK versions. Use of Secure Protocols e.g HTTPS.</p> <p>Access Rights - The solutions/Applications to provide capability for Managing Access Rights at all granularity levels that will be defined during project Scoping. For All Safaricom Staff users' expectation is to integrate to Existing Active Directory from Microsoft. External non-Safaricom Staff Users (Partners and Partner Employees) to use Safaricom Digital Identity for Logging into the System (REST API for this will be provided)</p>	Must Have

TFR012	<p>Standardized Tooling: The Systems to be developed using standard tools used by other Safaricom Developers, all the development teams to use standard collaboration tools used in Safaricom – JIRA, Confluence, GIT , IntelliJ, Android Studio, Visual Studio Code, Swift/XCode for IOS</p> <p>The solution developed must be versatile to work with existing Handsets/Computers in Safaricom Partner Ecosystem supporting most common browsers/devices.</p>	Must Have
TFR013	<p>AI, Reporting & Analytics: Safaricom uses Qlik for Internal Dashboards and Reports. The Vendor is expected to integrate and develop reports on this. All Partner to access Reports on Portals and Mobile Apps – these are to be 100% Open Source. All Reports to be real-time.</p> <p>The Solutions developed to be Data/AI/Insights driven e.g. predictive pre-ordering. All AI/ML Capability to use Open-Source Technologies. All data generated by the system to be shipped to Safaricom Data Lake using Open-Source NiFi/Kafka</p>	Must Have
TFR014	<p>Always On: The Solutions developed must provide High Availability of Service, have an up-time of 99.9995% in a year, Service Error Rate < 2%, MTTR < 10 Minutes. AI driven MTTD < 2 minutes. Use of AI/ML & Robotics in Service Availability e.g., Predictive Maintenance. Development of Operations/System Health Dashboards using ELK (ELasticSearch, LogStash and Kibana). System Alerts for out of Normal Operating Conditions, Incidents & Early warning Systems (Predictive)</p> <p>Solutions to provide alternative communication in case of no data network e.g. Binary SMS/Offline Capability.</p>	Must Have
TFR015	<p>Automation: All Operations & Testing tasks to be fully automated, all failovers automated, log clearing automated, configuration changes automated etc. Deployments fully automated using best practice DevSecOps – Safaricom will provide the tools</p>	Must Have
TFR016	<p>Configurations: The solution to have flexibility in design to enable Configurations rather than Code Changes when business changes occur – e.g., regional structures/hierarchy changes</p>	Must Have
TFR017	<p>Lifecycle management: the developed solutions to include clear versioning capability. This must be fully documented. All Designs and Software to be fully documented.</p>	Must Have
TFR018	<p>Open Source First: Applications developed to use 100% Open-Source technologies. Even when hosted on Public Cloud, the Open-Source standard must be upheld, e.g., use of open-source MongoDB as opposed to use of Mongo-Atlas. The only component that will attract costing/charges will be Infrastructure/Hosting fees and other existing Safaricom Security Tools that will be integrated to these solution/applications.</p>	Must Have

TFR019	Digital First: All Solutions developed must support Mobile (Android and IOS) & Web. All teams on the go will use Mobile Apps. All office-based teams use Web portals. USSD will not be supported	Must Have
TFR020	Incident Management/Issue Reporting – ChatBot Capability to be provided for all teams for raising incidents when using the Digital Channels Provided. All Incidents to be recorded on Standard Safaricom Incident Management Tool – BMC Remedy (Integration API will be provided for this). Capability must be provided for Dealer Support Teams (Business teams to first curate the incident, resolve Business issues and Escalate/Reassign the incident to Technical Teams in Case it is a Technical/Platform Issue. The Partner to have visibility of Incident Status.	Must Have
TFR021	Integrations: Some solutions capability will require integration to the existing ERP (Oracle E-Business Suite), Mobile Money Platform (MPESA) & GSM Billing Platform etc. API Integration will be through SOAP as well as REST-JSON – documentation will be provided during detailed scoping.	Must Have
TFR022	IP Ownership: All IP Rights of Software/Applications/Solutions Developed under this Project/Contract will be owned by Safaricom PLC. The vendor will have no IP rights to the solutions/software/code. This will be explicitly documented in the contract.	Must Have
TFR023	No Partners: Your company must demonstrate the capability to build the solution without the use of other partners. Safaricom will only contract & work directly with your company.	Must Have

3.0 SUBMISSION OF ENQUIRIES AND RESPONSES

All enquiries relating to this EOI and the final responses should be addressed to: Cokumu1@Safaricom.co.ke ; copy to bids@Safaricom.co.ke on or before 16th **AUGUST 2023 5:00PM EAT.**

4.0 EOI Requirements for the bidders

	Requirement	Response	Comments & Attachments
1	Company profile (Provide a brief overview of your company, including its background, organizational structure, key personnel and years of experience in implementing partners management & SFE systems. Highlight any relevant certifications, industry affiliations or awards that		

	demonstrate your expertise in solutions provision to a business with an extensive distribution network. (e over a 100k touchpoints. Describe your company's approach to digital solutions development, unique strategies, best practice, or technologies that set you apart. Provide your Certificate of incorporation/Registration certificate and list of your operation locations)		
2	Financial Capability (Audited Financial statements for the past three years.)		
3	Technical Expertise Detail the tools, technologies, and systems that your company uses for digital cloud native solutions development including: <ul style="list-style-type: none"> • Expertise on Agile delivery for production systems • Development of automated processes using AI and robotics • Delivery of solutions that integrates data and APIs to legacy back end systems. • Demonstrate the use of open-source technologies to deliver customer solutions. • Demonstrate the functional capabilities and experience of an end-to-end management and operations of a similar Own built solutions (not COTS solution) • Real time data analytics and reporting capabilities of a similar magnitude ie >100k touchpoints and >45million active customers. • Demonstrate your support and response structure for technical support 		
4	Legal Compliance (Confirm that your company operates in compliance with all applicable laws, regulations and industry standards including data privacy and consumer protection laws. Provide details of any licenses, certifications, or registrations required for operating as a software service provider)		
5	Client References (Provide at least 3 references from your clients including their contact information along with a brief description of the software services or projects provided to them directly. Provide certified technical teams and demonstrate competency for deployment and support.		

6	Valid Tax compliance certificate		
Note: Please provide any other additional information that Safaricom should be aware of.			

5.0 INSTRUCTIONS TO RESPONDENTS

Below are instructions that responses to this EOI MUST adhere to;

1. Please provide all responses in standard file formats i.e. XLSs, DOC(X) and PDF.
2. Please NOTE that the receipt of a response shall not bind Safaricom into any contractual agreements with the vendor responding to this EOI. Such arrangements shall only come into place once a tender process has been undertaken and an award issued to successful bidder(s) as evaluated technically and commercially.
3. Please NOTE that any costs associated with the preparation and submission of the response to the EOI shall be borne by the vendor.
4. Please indicate if you intend to submit this bid as a joint venture/consortium or any other joint format and state the partner in this case.
5. Please submit your organization and staff experience information in the format provided in appendix 1 (Information on staff and organization experience) of this document.
6. Please share accompanying links to demos/documentation on the necessary technical descriptions of previous work undertaken of a similar nature.

6.0 NEXT STEPS

Once Safaricom PLC receives responses to this EOI on the closure date indicated, an Evaluation Committee will be constituted to evaluate the responses provided by the EOI respondents.

- The Evaluation Committee constituted shall evaluate all the responses to the EOI and including all supporting documents, links & documentary evidence. Please NOTE that failure to submit requisite supporting documents or documentary evidence, may lead to rejection of the EOI response.
- The Evaluation Committee may seek additional documents as it deems necessary, at its discretion as part of the evaluation exercise that will be undertaken
- EOI respondents who meet the minimum requirements will be called for a detailed presentation for further evaluation of their technical capability, product quality, Quality Analysis procedure, etc. as part of the EOI evaluation.

- Only those EOI respondents that meet the minimum requirements indicated in the Aims and Objectives section will be shortlisted following successful presentation of their offering/solution proposal
- Successful potential partner(s) will be notified accordingly.

Below is a summary of activities from when the EOI will be sent out to closure/contracting.

NOTE: These dates are tentative and any changes that deviate from the below will be communicated.

No.	Activity	Approximate Dates
1.	EOI sent out	8 th August 2023
2.	EOI receipt	16 th August 2023
3.	EOI responses review and evaluation	17 th to 21 st August 2023
7.	Tender Process including Evaluation	23 rd August 2023 to 6 th September 2023
9.	Award and contracting	18 th October 2023

7.0 NOTE

Safaricom PLC reserves, at its sole discretion, the right to select or reject either in totality or partially, any or all proposals made in the context of this EOI. Any such decisions made will be final and no correspondence will be engaged into, other than for informing the bidders of the outcome of the process.

Appendix 1: Information on staff and organization experience

Table 1: Please provide a list of your company's Key Technical Staff who will be on this project

Name	Current Position	Years of Professional Experience

Table 2: Please provide a list of your company's Relevant Project experience in the last two (2) years

Project Description	Year of Project Delivery	Client	Project Outcome