



# REQUEST FOR INFORMATION (RFI) FOR SINGLE VIEW OF THE CUSTOMER

(SVC) Project

**Document Release Date: 6th August, 2020**

**Last Date for Receipt of responses: 20th August 2020 (17:00 Hours EAT)**

**(Via electronic submission to the email address given)**

## Contents

---

<b>1 Introduction.....</b>	<b>2</b>
About Safaricom .....	2
About the Request for Information .....	2
Disclaimer .....	2
Accuracy and completeness of response to the RFI.....	2
Confidentiality .....	3
No Contract.....	3
Enquiries .....	3
Form of Response to RFI.....	3
Instruction to respondents .....	3
<b>2.0 Safaricom Single View of The Customer - RFI.....</b>	<b>4</b>
2.1 The Purpose of this RFI.....	4
2.2 High Level customer journeys .....	6
2.3 RFI Proposal.....	6
<b>3.0 SINGLE VIEW OF THE CUSTOMER REQUIREMENTS FOR RFI .....</b>	<b>7</b>
<b>4.0 SINGLE VIEW OF THE CUSTOMER RESPONSES.....</b>	<b>8</b>
<b>5.0 Environment .....</b>	<b>12</b>
Single View of the Customer Backend.....	12
<b>6.0 RFI Response Process .....</b>	<b>13</b>
6.1 Response Format.....	13
6.2 Engagement Process & Rules.....	13

# 1 Introduction

---

## About Safaricom

Safaricom Plc is the leading integrated communications services provider in Kenya and seeks to continuously offer new and innovative services that meet the changing needs of its customers through partnering with competent suppliers and service providers for provision of these services.

The purpose of this document is to outline the necessary capabilities and information sought from industry players specialized in management of customer information in a single/integrated view and consolidation of customer data across multiple systems across the customer value chain with reporting analytics/AI and should be used as a guide for submission of responses.

## About the Request for Information

Safaricom Plc is soliciting for information from industry players for a robust Single View of the Customer solution in a telecommunications service provision environment. Information obtained from responses submitted will only be used to improve Safaricom's knowledge of the vendors' capabilities. No commercial evaluation of participating vendors will occur, and your participation is not a promise of future business with the company. Responding to this RFI does not preclude the vendor from bidding on any future solicitations. Safaricom Plc appreciates your cooperation and looks forward to a meaningful and productive collaborative market research effort. Safaricom Plc will treat all information received from RFI respondents as confidential. Recipients of this document shall also not disclose the content of this RFI to 3rd parties without written permission from Safaricom Plc.

## Disclaimer

1. This request for proposal does not commit Safaricom to contract for any supply or service whatsoever.
2. Responding to this RFI does not preclude the vendor from bidding on any future solicitations.

## Accuracy and completeness of response to the RFI

This RFI has been issued to you in order to establish whether your proposal meets our functional and technical requirements. Your response will be deemed as a true and accurate reflection of your organization's ability to meet our stated requirements and will thus form part of the basis of our selection on whether to drop or proceed with your company to the next phase of the process. Thus, it's imperative that you provide relevant information as much as possible.

You are advised that should your organization be selected as the vendor of choice, any and all commitments made in your response to this RFI will be used as a condition in any subsequent

contractual relationship between Safaricom Limited and yourselves; However, the award of the subject RFI for BID Partnership Proposal, does not under any circumstances oblige Safaricom to engage with the chosen supplier on deploying a commercial solution/product.

### Confidentiality

This RFI contains proprietary and commercially sensitive information and is therefore strictly confidential.

### No Contract

Save for where it has been specifically stated, no term or provision in neither this RFI nor any response thereto whether in an approved form or otherwise will be construed as creating any contractual relationship between yourself and Safaricom Plc.

### Enquiries

All enquiries regarding the RFI should be sent via email to [aongayo@safaricom.co.ke](mailto:aongayo@safaricom.co.ke). These enquires must be received before **12:00p.m. on Tuesday 11<sup>th</sup> August, 2020** to allow sufficient response time from our technical team in view of the closing date.

### Form of Response to RFI

Your response to this RFI must be submitted via email accompanied with a PDF copy of a cover letter that is signed by two (2) duly authorized representatives of your organization who are competent to provide the requested information on behalf of your organization.

### Instruction to respondents

- (i) Analyze the contents in the section 3.0
- (ii) Build a detailed response in response to this RFI.
- (iii) Provide a comprehensive write up on your industry experience.
- (iv) Provide references where you have partnered or provided similar services.
- (v) Outline and recommend industry best practices and trends for Safaricom consideration.
- (vi) Provide a signed letter of introduction and overview of your company.
- (vii) All responses should be provided in electronic format only, i.e. emailed to Anita Ongayo of supply chain at [Aongayo@safaricom.co.ke](mailto:Aongayo@safaricom.co.ke) by **Thursday 20<sup>th</sup> August 2020, 5:00 PM EAT.**
- (viii) All technical questions/clarifications related to this RFI should be sent to supply chain through [Aongayo@safaricom.co.ke](mailto:Aongayo@safaricom.co.ke) by **Tuesday, 11<sup>th</sup> August 2020, 12.00 Noon EAT.**
- (ix) Safaricom may specifically request a bidder to make a presentation of their product portfolio offering, relevant to the context of this RFI.
- (x) The receipt of a response shall not bind Safaricom into any contractual agreements with the bidder. Such arrangements shall only come into place once a **Request For Proposal (RFP)** is issued and the bidder is successful (as evaluated technically and commercially).
- (xi) Any costs associated with the preparation and submission of the response to the RFI shall be borne by the partner.

## 2.0 Safaricom Single View of The Customer - RFI

---

### 2.1 The Purpose of this RFI

The objective of this document is to highlight the various use cases and technical requirements of the Single View of the Customer (SVC) that will guide us in identifying a vendor(s) who will provide a solution that will enable Safaricom to meet its expectations. Safaricom has over 35 Million subscribers based on the 90 days active MSISDNs. However out of these active subscribers, we have multiple MSISDNs per one customer with various products and there's need to consolidate this data into a single view of the complex interactions within the ecosystem into a product, service experience and analytics lenses.

Our vision of Transforming lives as a digital service provider is focused on being simple, transparent & honest, with Experience Leadership being our brand differentiator. Our current applications do not have a single view of the customer to enable us to live this promise since our customers are currently identified by their mobile number.

#### **THE TEAM IS SEEKING A SINGLE VIEW OF THE CUSTOMER TO ENABLE:**

- ❖ Have a consolidated view of the customer across their different services in Safaricom.
- ❖ Customized service delivery based on the wholistic view.
- ❖ End to end customer management.
- ❖ Better segmentation and targeting of customers in terms of products, solutions and services.
- ❖ Track customer use across the different platforms- Voice, USSD, App, ChatBot, Web etc.
- ❖ Real-time creation and access of ID graph– digital, non digital channels.
- ❖ Delivery of highly personalized and highly relevant experiences across all digital touchpoints

#### **The Single View benefits to Safaricom**

- ✓ Leverage on information to improve the quality of service.
- ✓ Drive most value for the customer.
- ✓ An end-to-end understanding & single view of the customer.
- ✓ Move towards customer segment simplification.

#### **Objectives: -**

1. Our main objectives for the Single View of the Customer is
  - ✓ Aggregate data from multiple systems and Provide internal users with a single view of the customer's account and its associated interactions with Safaricom.
  - ✓ Ability to view products consumed across the value chain including FSI products and services, demographics, customer relations, customer behaviors and how they relate with our various touch points

- ✓ Availability of the interaction, query/contact types, associated noted and resolution

### **Current state:**

Contact centre handles about 110k queries from customers daily on voice, social media and email. Retail Channel handles an average of 18,000 customers daily in need of assistance in a wide array of services. It is not possible to view the entire ecosystem pertaining to a customer at a glance - products, service, interactions across various system to improve engagement as these information sits across multiple systems with varied architecture.

### **Single View of the Customer Use Cases**

We envision a single view of the customer from across multiple systems to drive the use case ambitions below;

#### **a) Customer Experience**

- An end- to- end understanding & single view of the customer.
- Enable proactive management of customers and their behavior across touchpoints.

#### **b) Product Penetration**

- Onboard, Grow, increase customer lifetime value.
- Provide cross-sell / upsell Opportunities.

#### **c) New opportunities**

- Move from SIM cards to customer ecosystem.
- Leverage on emerging new business opportunities

## 2.2 High Level customer journeys

Various customer journeys have been developed by Safaricom for the above use cases. These journeys reveal various interaction of users of the system identified as actors and their respective actions in the system during various process functions.

At a high level, a customer visits/calls our help channels – Voice, SMS, e-mail, USSD, retail shops, care desks or interacts with Safaricom on our online platforms - APP, ZURI (ChatBot), Website, Selfcare. Customers may also purchase a new line, product or service and transact with our various platforms at any one point in their lifecycle as SMS, data, M-PESA, FTTH etc.

After the service has been offered and is complete, the customer receives confirmation notifications of these transactions and may from time to time receive targeted marketing messages from Safaricom. Customers also interact with 3<sup>rd</sup> parties across all our platforms depending on the customers profile – banking, restaurants, online purchases and will on various occasions be subjected to NPS/CSAT surveys.

Various services will require various types of input and outputs, however, they will all have the basic journey above.

## 2.3 RFI Proposal

The scope of proposal of the solution the vendor is expected to cover is as below;

1. Proposal of a solution for complete Single View of the Customer covering both digital data sources and traditional data sources such as CRM and billing.
2. the type of integrations required to achieve SVC
3. Real-time customer correlation strategies.
4. Delivery of highly personalized and highly relevant experiences across all digital touchpoints
5. Consent management to ensure data privacy is maintained.
6. Support & maintenance consideration.

### 3.0 SINGLE VIEW OF THE CUSTOMER REQUIREMENTS FOR RFI

No	Item	Description
<b>SOFTWARE</b>		
1	Operating System	Specify operating system platform specifications
2	Compatibility	Ability to work with standard hardware
		Ability to integrate to our internal systems
3	IT Security	Encryption of data stored on the platform and during transmission
		User access and password management adherence
		Audit logs
4	Monitoring Logs	System audit logs showing all activity carried out on the platform.
		System logs showing system performance
		Error logs showing platform and hardware malfunctions
5	Notifications	Notifications to customers via SMS
		Notifications to customers via Email
<b>REPORTS</b>		
1	Reports	Real-time reports on services rendered, customers and status of the service offered – successful/failed
		Detailed reports on customers served, service(s) offered, authentication mode and status, service status, date and time
		Ability to extract reports in txt, Microsoft Excel or .csv, PDF formats
<b>ADDITIONAL REQUIREMENTS</b>		
1	Cloud & Security Architecture	Provide architecture of entire solution
2	Performance	Provide performance indicators for each functionality
3	Backend Server Specifications	Backend server specifications



4	BCP	Business Continuity and Recovery plans for the platform
5	Support	Provide support level structure and channels
5	Licenses	Provide software license details

## 4.0 SINGLE VIEW OF THE CUSTOMER RESPONSES

<b>1.0      General Solutions Requirement</b>
<ul style="list-style-type: none"> <li>Please provide a detailed description of the proposed solution (architecture, components, communication flows between components, numbers of components, etc.) supported by a high-level block diagram and highlighting the key features that make the solution superior/unique compared to other competing solutions and clearly state the unique capabilities offered.</li> </ul>
Provide your response

<b>1.1      Functional Requirements</b>
<p>Clearly describe in detail the overall capabilities with regards to:</p> <ul style="list-style-type: none"> <li>Customer life cycle management.</li> <li>Customer's consolidated portfolio; all the services and product subscriptions in the organisation.</li> <li>Segmentation and real-time personalization of customers.</li> <li>Value propositions through cross and upsell based on customer data and usage analysis.</li> <li>Credit Scoring. Ability to be able to score the customers</li> <li>Real-time customer pain point detection and action to remedy.</li> <li>Efficient customer churn analysis. Provide customer analysis to manage customer churn.</li> <li>Customer location information. Provide customer geolocation</li> <li>Transaction (offline &amp; online) consolidated and detailed views. Aggregation of customer transactions such as M-PESA transactions, Usage information for calls, data, voice.</li> <li>Customer journey analytics and communications. Interactions at customer touch points.</li> <li>Partner integration; Health, Security, Logistics, Insurance, Manufacturing.</li> <li>Location, Base station &amp; Service based statistics and ad-hoc analysis.</li> <li>Ease query of customer information. Sub second response for all queries.</li> <li>Data retention strategy configuration on the platform.</li> <li>A/B testing capabilities</li> <li>Advanced predictive analytics. Prediction of optimum next move with a customer.</li> <li>Orchestration of targeted customer Omni-channel campaigns.</li> <li>Consent management</li> <li>KYC documents management</li> <li>Suspicious activity detection &amp; prevention. Real time customer data analytics to detect and prevent fraudulent activities.</li> </ul>
Provide your response

<b>1.2 Non-functional requirements</b>
<p>Clearly describe in detail the overall technical requirement and capability on your proposed system / platform. These technical requirements have been broken down into several broad areas and specific information will be essential in this RFI. The vendor is requested to clearly and vividly address these areas in detail on how the system can go about addressing the below technical areas:</p> <ol style="list-style-type: none"> <li>1. <b>Interoperability</b> – ability to integrate through various technologies</li> <li>2. <b>Data storage</b> – optimization, sharing and updating and Collaboration</li> <li>3. <b>Data migration</b> – Import export capabilities of the system.</li> <li>4. <b>IT Security</b> – Cybersecurity, Encryption standards, access control, MFA and tokenization etc.</li> <li>5. <b>BCP</b> – backup plan, disaster management, connectivity standards.</li> <li>6. <b>Universality</b> – Ability to add data sources with minimal interventions.</li> <li>7. <b>Uniqueness</b> – The difference between yours and others</li> <li>8. <b>Constancy</b> – the feature does not change significantly in the course of time.</li> <li>9. <b>Scalability</b> – Ability to extend functionality over time in modular fashion.</li> <li>10. <b>Collectability</b> – Ability to collect and correlate customer data.</li> <li>11. <b>Performance</b> – The feature that allows quantitative measure on data accuracy, speed of access, as well as robustness of the platform.</li> <li>12. <b>Acceptability</b> – of the system in practical application, fake resistance ability and operation within acceptable levels of accuracy and availability.</li> <li>13. <b>Customization</b> – Ability to modify the system functionality and code to ensure the platform adopts to changing user needs.</li> <li>14. <b>Data Modelling</b> – Customer data collection and modelling strategy on the platform.</li> </ol>
Provide your response

<b>1.3 Data Confidentiality</b>
Clearly state how your organization handles and stores customer data and compliance to various data protection laws.
Provide your response
<b>1.4 Integration</b>
<ol style="list-style-type: none"> <li>1. Clearly state if your platform is able to integrate to third party systems, and for which services</li> <li>2. Clearly state to what levels of modularity your platform support; this is to allow for configuring/implementing additional product features.</li> <li>3. Clearly state which functionalities are availed through the API</li> <li>4. Clearly state the messaging formats used for the API integration</li> <li>5. Clearly state the certifications attained.</li> </ol>
Provide your response.

<b>1.5 Security</b>
Clearly indicate how the system handles

- Audit trail
- Security Configs
- Data at rest
- Data in Transit
- Transfer Protocol
- Encryption
- Authentication/Authorization
- Role Based Access Control & Security Policies
- Row/Cell Level Security
- Service and User Accounts
- File Integrity
- Secure Perimeter
- Key & Password Management
- Audit Logs
- Vulnerabilities
- Secure Erase

Provide your response.

#### **1.6 User Account Management**

1. Clearly state how user access is managed on your platform.
2. Clearly state whether your platform will provide capabilities for system users to be able to perform account management tasks in form of a Do It Yourself.

Provide your response

#### **1.7 Customer Support**

1. State how customer queries will be supported and the system available to aid in customer issue resolution. What is the average wait time for your customer service?
2. Clearly state if you have a customer self-service interface (Web and API based).
3. Clearly state what customer management tools are available for operation teams – Customer Service & Back Office Operations.
4. Clearly state whether the platform can integrate with 3rd party customer relationship management system or chatbots. You can advise on 3rd party customer support systems you have integrated with
5. Kindly provide your escalation matrix

Provide your response.

#### **1.8 Platform Transactional/Activity Statements**

1. Clearly define how you will provide transactional statement history, detailed/summary of all the transactions by date/time ever recorded.
2. Clearly state if users can generate statements based on services provided, by customer, by date

Provide your response.

### **1.9 Risk & Fraud Mitigation**

1. Clearly state the risk management process in place.
2. Clearly state how algorithms are implemented.
3. Clearly state how the platform handles transactional patterns.
4. Clearly state how the platform handles access behaviours
5. Clearly state if risk and fraud management parameters are configurable per client.

Provide your response.

### **1.10 Reporting & Analytics**

1. Clearly state if your solution is able to provide dashboards for reporting from all modules that it has.
2. Clearly state if your solution is able to integrate to other reporting platforms.
3. Clearly state if your solution is able to allow for predefinition of scripts, jobs and web services for data retrieval, migration and backup.
4. Clearly state if your solution has a large variety of out-of-the-box reports. A list of the reports MUST be provided.
5. The solutions reports must be exportable in at least THREE file formats and must include at least PDF, XML and CSV
6. Reports must be able to be transmitted via direct download from console and via email. Reports shall be able to be auto-sent after the completion of a scan.
7. The solution must provide for customization of reports to allow inclusion/exclusion of some results, removal of unnecessary details, inclusion of custom logo and custom text in headers, titles and footers

Provide your response.

### **1.11 High availability & Disaster Recovery**

1. Clearly state how the platform achieves High availability to ensure system reliability in times of system instability in part or as a whole
2. Clearly state the turn-around time taken to fail over in the event the primary site is affected

Provide your response.

### **1.12 System Alarm & Monitoring Capabilities**

- Elaborate clearly how system issues are alerted for an action to be taken by the necessary support teams.
- Clearly state which monitoring systems you use and if it's possible to integrate to 3<sup>rd</sup> party monitoring applications
- Clearly state how configurable the monitoring capabilities are and the ease of setting monitoring rules and threshold on the system
- Does the solution provide a GUI view for monitoring system performance, capacity and resources utilization

Provide your response.

### **1.13 Service Agreements (SLA)**

- Clearly state the maximum capacity of transactions throughput (TPS).
- Clearly state if in event the volumes and transactions increase, what is the regeneration plan to mitigate the new TPS or are new build transaction fees based on the new plan.
- Clearly indicate the escalation matrix

Provide your response.

### **1.14 Business Continuity**

1. Clearly describe your Business Continuity Plan (BCP) that is in place.
2. Clearly indicate any disaster management plan and policies.

Provide your response

### **1.15 ISO Compliance**

Clearly state which ISO certifications your organization has attained. You will be required to provide supporting documentation

Provide your response.

### **1.16 IEC JTC Compliance**

Provide your response.

## 5.0 Environment

---

### Single View of the Customer Backend

1. Cloud native application / On premise application
  2. Software licenses required and licensing model
-

## 6.0 RFI Response Process

---

### 6.1 Response Format

The prospective partner shall respond to the requirements outlined above as well as submitting a partnership proposal titled - **Safaricom Single View of the Customer** RFI in MS Office Word/PDF format that provides response to Safaricom requirements. The document should further provide the following information about the prospective partner.

1. Company corporate information
2. Partner's strategy & level of participation in BID ecosystem.
3. high level cellular based services architecture
4. List of previous customer data platform projects undertaken
5. Possible commercial models in the partnership
6. Statement of key differentiators

### 6.2 Engagement Process & Rules

1. Safaricom shall use the prospective partner's response in evaluating its suitability for formal engagement which shall be communicated. Such engagements may include solution presentation to Safaricom for evaluation and shortlisting.
2. Only shortlisted partners shall be invited for Request for Proposal evaluation.
3. In cases where the prospective customer does not have all the sought capabilities thus seek to partner with 3<sup>rd</sup> party suppliers to complement its proposal, such partners shall be the single point of contact within the contract which shall include management and enforcement of SLAs to 3<sup>rd</sup> party as well as legal framework to use 3<sup>rd</sup> party software licenses.