

**SBI PAYMENT SERVICES PVT LTD.**  
**(A Joint Venture between SBI & Hitachi Payment Services)**

**1<sup>st</sup> Floor, Madhuli Building, Shiv Sagar Estate, Opposite Nehru Planetarium, Worli – 400 018**

**Request for Quotation (RFQ) for Field Force Management**

**RFQ No. SBIP/ VM/22-23/05**

**Date:11-10-2022**

**SBI Payment Service Private Limited** (hereinafter referred to as “**SBI PAYMENTS**”) is a Joint Venture between SBI & Hitachi Payment Services established with the objective of carrying out Merchant Acquiring Business activities.

SBI Payments invites quotations from reputed companies providing related Field Force Management for employees based across India at Corporate office at 1<sup>st</sup> Floor, Madhuli Building, Shiv Sagar Estate, Opposite Nehru Planetarium, Worli – 400 018.

**SCOPE OF SERVICES**

SBI Payments is seeking an experienced and capable Vendor to provision, implement, and support a Field Workforce Management Software solution. SBI Payments anticipates utilizing the proposed solution to address processes associated with scheduling and managing staffing including but not limited to Leave and attendance, Tracking, training documents, announcing any communication, target and achievement etc.

SBI Payments requires a Field workforce management software solution for approximately 1500+ FoS/FRE during the first phase which will increase to 2000 and 2500 during next few months. The scope for this RFQ is for the products and services required, including application software, configuration, implementation, testing and training as well as ongoing maintenance and support. The following are high level business needs of the workforce management software system. This list of requirements is not exhaustive, rather a representation of SBI Payments’s general needs. They are not in order of importance. Please consider these when preparing your response.

1. Attendance and leave Management- To automate attendance & leave for all field staff.
2. Visit planning and tracking- Field staff to initiate a visit with the categorization of adhoc, planned, follo-up, relationship, branch visit etc. The software must track the location from where visit is initiated the suggest the best route map and calculate total KM travelled.
3. Customer category (New, existing etc)- While initiating the visit staff shall have option to fill the details of customer such as Customer type (Corporate, Retail), Customer Business (OMS, Restaurant etc.), Lead (Own, Branch, Corporate office etc)
4. Route tracking- The system must give the entire day route map for FoS/FRE
5. Live location- Manager must be able to see the live location of staff.
6. Training module with options to upload pdf, jpeg, videos etc.
7. Lead assignment -Beat route management
8. Communication module for any announcement with feasibility to share with selected staff as well.
9. Dashboard & analytics, roles wise (TL, Manager, Sr. Manager...CBO etc)





**Validity of the contract:**

The contract will be initially valid for 12 months and will be renewed based on the review conducted by SBI Payments.

**Right to impose Penalty**

In case of any breach of compliances/ Scope of work during the contract period, SBI Payments reserves the right to initiate the actions with regards to penalty as per standard clause.

**Eligibility Criteria:**

- The Vendor should have at least 2 years of experience in providing services related to Field Force Management.
- The vendor Should be authorised to carry out the services defined in the scope of services.
- Should be able to provide quick services and resolve any down time issues promptly.
- The vendor should have a valid PAN, GST registration and required to submit complete details of his/ their Business / Partners / promotors.
- Vendor should ensure proper coding practices are followed and static and dynamic source code review needs to be conducted. The vendor, preferably, should have CERT-IN empanelled auditor.

**Mandatory Documents:**

- Company PAN CARD & AADHAR
- GST Certificate
- Certificate of Incorporation
- Previous Clients reference (PO/ experience letter/engagement letter)
- Memorandum of Association
- Article of association

**Submission of quotation:**

The vendor has to submit their Commercial proposal along with mandatory documents (mentioned above) on or before 19.10.2022 at 05:00 PM detailed as follow:

| In Person at  |    | By email at   |
|---|----|---|
| SBI Payment Services Pvt Ltd<br>1 <sup>st</sup> Floor, Madhuli Building, Shiv<br>Sagar Estate, Opposite Nehru<br>Planetarium, Worli – 400 018 | OR | I. <a href="mailto:vpvm@sbipayments.com">vpvm@sbipayments.com</a>             |
|   |    | II. <a href="mailto:dvphr@sbipayments.com">dvphr@sbipayments.com</a>          |
|   |    | III. <a href="mailto:amhr.ops@sbipayments.com">amhr.ops@sbipayments.com</a>   |
|   |    | IV. <a href="mailto:srexevm@sbipayments.com">srexevm@sbipayments.com</a>      |
|   |    | V. <a href="mailto:vm-support@sbipayments.com">vm-support@sbipayments.com</a> |



For any further details/information about the requirement, please contact the below persons at SBI Payments.

| Contact person Name | Designation | Email Id   |
|---------------------|-------------|--|
| Mr. Ashish Semwal   | DVP HR      | <a href="mailto:dvphr@sbipayments.com">dvphr@sbipayments.com</a>       |
| Mr. Manoj kumar     | VP- VM      | <a href="mailto:Vpvm@sbipayments.com">Vpvm@sbipayments.com</a>         |
| Ms. Richa Narain    | AM – HR     | <a href="mailto:amhr.ops@sbipayments.com">amhr.ops@sbipayments.com</a> |

SBI Payments reserves the right to reject any or all the proposals without assigning any reason thereof.



Manoj Kumar  
(VP- Vendor Management)

