



INDRAPRASTHA GAS LIMITED

(A Joint Venture of GAIL, BPCL & Govt. of NCT Delhi)

Date: 01.06.2023

PRE-TENDER MEETING FOR FLOATING OF TENDER FOR "IMPLEMENTATION OF SAS BASED ADVANCED CRM SYSTEM"

Indraprastha Gas Limited (A Joint venture of Gail India Limited, BPCL & Govt. of NCT of Delhi) is a pioneer and leading company which is providing CNG to automotive sector and PNG to domestic, commercial & industrial sector.

Indraprastha Gas Limited is a PNGRB authorized entity for retailing of CNG & PNG in Delhi, Noida, Greater Noida, Ghaziabad, Hapur, Meerut, Muzaffar Nagar, Shamli, Rewari, Karnal, Kaithal, Gurugram, Ajmer, Pali, Rajsamand, Fatehpur, Hamirpur and part of Kanpur. Accordingly, IGL invites pre tender meeting of reputed agencies for Implementation of SAS based Advanced CRM system.

IGL intend to have discussion & deliberation on technical aspects for Implementation of SAS based Advanced CRM System and getting the inputs from potential bidders for a successful competitive bidding.

Further, bidder should send their technical query via. email on below mentioned email IDs at least 48 hours before the date of Pre Tender Meeting:

1. mayank.mittal@igl.co.in
2. nikhil.srivastava@igl.co.in

The meeting shall be conducted in **ISID office Vasant Kunj Institutional Area, Vasant Kunj, New Delhi-110070**. Instructions to bidders for meeting:

S. No.	Description	Schedule of Meeting
1	Pre Tender Meeting for SAS based Advanced CRM System	Friday 1000 HRS to 1300 HRS on 9 th June 2023

Mayank Mittal

Thanks & Regards,
For & On Behalf of INDRAPRASTHA GAS LIMITED

Enclosure: Brief Scope of Work

IGL Bhawan, Plot No. 4, Community Centre, Sector-9, R.K. Puram, New Delhi-110 022

Tel. : 46074607 Fax : 26171863 Website : www.iglonline.net

CIN : L23201DL1998PLC097614

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SCOPE OF WORK

The IGL wants to introduce and replicate best practices and techniques in managing customer base with the objective to improve overall business performance and efficiency. The new technology and practices in the areas of Customer Relationship Management CRM should enable IGL to achieve the objectives of operational efficiency, streamlined processes, workflow automation, Management Reporting on Real Time basis and repertoire/Archives of previous engagements. The IGL invites technically complete and commercially competitive bids from reputed bidders for Empanelment of solution provider for the Implementation, Support and Maintenance of a Customer Relationship Management (CRM) system.

Customer Relationship Management (CRM) solution should help automate and manage the customer journey throughout its lifecycle. IGL aims to have consolidation of customer information into a single repository through 360° view so the internal teams can better organize and manage relationships, automates common processes, and provides tools to monitor performance and productivity. The CRM solution should integrate with the existing systems and other applications used by the IGL.

The data ownership will remain with the IGL. Control Room/Zonal Offices/GA/Customer Care Centre/Walk-in Centres should be able to work on and/or upload data to / download data from CRM, with role-based access. Based on the contents of the RFP, the bidder shall provide end-to-end solution delivery of CRM solution meeting the requirements of the IGL. CRM solution must act as strategic determiner of IGL's business growth as well as facilitate for new customer acquisition by adding value of our customer's journey. The CRM solution shall technologically enable all IGL Sales, Services, Marketing functionalities.

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2	Customer Self Service Portal
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1. Customer on boarding process (Channel: Mobile & Web)

- i. There should be an application to manage & automate the customer acquisition process.
- ii. Customer should have OTP based option to raise new connection request himself online.
- iii. Automatic assignment of Employee/Team Responsible based on system logics to different departments.
- iv. System Application to be available on Android and iOS platforms.
- v. should be able to have SLAs and track service requests at each stage of application status.
- vi. In case of SLA breach, automatic escalation/reminder emails to be sent to stakeholders.
- vii. Automatic assignments to different department while updating status of lead.
- viii. User should be able to upload documents.
- ix. Fields will be required to fill necessary details of customers like meter number, reading etc.
- x. System should have provision to send Email, SMS and WhatsApp communication to customers.
- xi. System should be able to update real time activities relevant to ECC/IS-U
- xii. Approval to be triggered based on system logics to approving authority in Email or tasks
- xiii. Validations and checks to be implemented at various steps of acquisition.
- xiv. System should have facility to design workflow for on boarding process which include major milestones like: Document Upload by Customer, Feasibility Survey, Meter Installation, Gas Charging etc.
- xv. System should have ability to auto-create tasks for relevant team members based on the application stage. Different teams are involved for on boarding such as Project Zonal In charge, Third Party Inspection Agencies, Pipeline Laying Contractors, Commissioning Agencies, Project Management Consultants
- xvi. In case of any failure in CRM system, easy to investigate error message must be shown correctly to eliminate the root cause.
- xvii. The IGL team should be able to create tasks for the customers for any action required at their end - e.g., Civil work, etc.
- xviii. Verification of the KYC documents uploaded by the customer, option to approve/ reject the documents & notify the customer accordingly
- xix. Feature to block duplicate application request
- xx. The on boarding team must be able to update the status, edit details and raise approvals as per the defined business logics, via the application only.
- xxi. System should have ability to attach files/ pictures - e.g., address proof, identity proof, etc.
- xxii. Inventory of required materials real time status to be visible to project dept.

2. Customer Self Service Portal & Customer App

- i. Customer should be able to register via OTP through Email or SMS
- ii. Customer should be able to view his complete details in home page after login
- iii. Customer must be able to view bills, payment history, past transactions with their status, pending payment and due date.
- iv. Customer should be able to upload documents in self-login.
- v. Customer must be able to make online payments according to the bills pending
- vi. Customer should be able to avail real time support like VRA or FAQs
- vii. Customer should be able to track there service requests like new connection status or any complaint raised.



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- viii. Customer should be able to raise complaints and service requests online itself and upload relevant images for reference.
- ix. Live tracking of field agent to customer premise. Agent name, contact details and picture must be visible to customer.
- x. Customer should be able to fill feedback against service requests completed.
- xi. Details of the branch offices of IGL will be displayed out here.
- xii. Upload real time meter reading and punching in system to generate bills instantly (Self Billing) in a defined billing window.
- xiii. Customer self-service app to be available on iOS and Android platforms
- xiv. Customer should be able to log emergency requests easily
- xv. Customer should have chat bot assistance
- xvi. Customer should be able to contact us in app itself.
- xvii. Consumption Pattern should be visible
- xviii. Facility to recharge prepaid meter
- xix. Facility to track the location and details of service agent
- xx. Facility to understand the bill.
- xxi. Uploading of meter photo for damage related issues.
- xxii. Facility to download Bill
- xxiii. Integration with navjyoti application for CNG customers.
- xxiv. Static data related to CNG customers should be visible.(CNG station locator, saving calculator, cylinder testing, kit supplier etc)

3. Customer 360 degree view to IGL Users

- i. Complete details of the customer on a single screen 360 degree view.
- ii. Contact details, On-boarding history, Type of connection, Payment history, Previous billing history, Meter Number/ Meter Type, Last Meter Reading, Past interactions with customer, Past Service/Complaints history.
- iii. Social media interaction with customer to be available on single screen.
- iv. Alerts for VIP, VVIP Customers view to IGL Users screen.
- v. Technical Master environment view to IGL Users
- vi. Type of Billing opted by customer for eg. E- Bill, Hardcopy or WhatsApp
- vii. Connection status for eg. PD/TD/Active/Defaulter Disconnection.
- viii. Multiple connections of single customer.
- ix. Unified view of customer from different sources for better understanding of customer journey
- x. Should be able to collect customer data from different systems , unification of each customer data and provide data insight to deliver 1-to-1 personalised experience to customer on real time basis
- xi. Documents related to the customer shall be visible. (In integration with ECM-Open text)
- xii. System must support VRA (Virtual Remote Assistance)
- xiii. System should provide OCR (optical character recognition) functionality.

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4 Campaign Management

- i. Defining campaigning objective for market research.
- ii. Campaigning for multi-channel such as email, SMS and social media platforms
- iii. Campaign based on customer behaviour preferences and past interactions
- iv. Campaign to understand customer issues at one point like bulk survey or feedback
- v. Campaign for sending outage SMS and restoration SMS to customers according to geographical areas.

5 User Access Management

- i. Assignment of tasks based on department.
- ii. Assigning roles and authorizations to control user access to transactions.
- iii. To monitor the user activity and trace and identify security issues or compliance.
- iv. Logs to be generated to check and display authorization errors.
- v. Maintenance of user organizational structure to position the employee hierarchy.

6 Service/Complaint request Management

- i. Customers / agent should be able to log complaint in a centralised system.
- ii. Prioritize the customer request based on severity and impact on customer.
- iii. Automatic assignment of service request to appropriate team.
- iv. Updating the customer throughout the process of service request completion.
- v. Escalating service request to higher management in case of delay.
- vi. Generation of Job sheet through system
- vii. Inventory management in case of material is being consumed on customer premise
- viii. Automatic posting of Service charges & Material charges in next billing cycle.
- ix. Automatic assignment of Service notification and service order to the pre-defined team
- x. Automatic closure of Service order and service notification in SAP after work is done successfully.
- xi. Creation of notification/order in CRM system itself.
- xii. Rating of Technician to be captured based on performance rating by customer
- xiii. Generating online payment link in case of chargeable services
- xiv. Generating feedback survey link after closure of service request.
- xv. Close knit integration with customer app to provide real time update to customer.

7 Legacy data migration

- i. Migration of all our business master data to new system
- ii. Migration of all our transactional master data to new system



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8 Real time integration with SAP ECC

- i. Integration with ECC on real time basis such as updating customer details.
- ii. Updating technical installation, billing installation, move-in process, meter replacement.
- iii. Fetching bill details and downloading latest bill
- iv. Updating meter readings and generation of retail invoice.
- v. Disconnection/Reconnection of meter can be done in real time.
- vi. Generation of notification number or service order in ECC.
- vii. Integration with MM module for inventory management.

9 Bulk processing of cases

- i. Processing of service requests in bulk is crucial.
- ii. Updating Customer details like mobile, email are to be done in bulk mode also.
- iii. Replication of customer data from backend ECC is also required.

10 Reports and Graphical dashboards for management

- i. Daily reports for tracking progress of IGL service requests.
- ii. Business analytics for better insights of our performances.
- iii. Statistical views of dashboard for quick understanding of our KPIs.
- iv. To provide analysis of our customer master data management.
- v. Visibility of our new connections and defaulter customers.
- vi. Dashboard home page contains milestones data like Total Live customers, I&C customers, RFC done, BP created etc.

11 Defaulter Management

- i. Managing our defaulter system is required.
- ii. Sending payment reminders in regular intervals.
- iii. Sending payment links at regular intervals.
- iv. Updating payment info once payment is realised in our ECC system.
- v. Sending disconnection notice after all due reminders.
- vi. Assigning service request to concerned team for disconnection of connection.
- vii. Tagging of defaulter customer after disconnection is done.

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12 Integration with Third Party Applications

- i. Integration with our existing channel partner wherever applicable such as Prepaid Meter, Payment gateways, Bill desk, Paytm etc.
- ii. Integration with ECM (Open Text) application for document upload.
- iii. Integration with CTI (SAP BCM) for call centre operations.
- iv. Integration with IGL website for quick links.
- v. Integration with BOTs like chat bot and voice bot.

The system should have the ability to integrate with the following systems:

- SAP ECC/HANA/ ISU/MM/OT-ECM
- BI/ Analytics Tool
- Payment Gateway
- CTI - SAP BCM
- IGL Website
- Social Platforms
- SMS Gateway
- Data Lake/ Warehouse
- Voice Bot - MDP Infra: Yellow.AI
- Prepaid Meter
- Chat bot

The system should have the ability to integrate with the various SAP ISU touchpoints, as under:

- Business Partner
- Contract Account
- Contract (Billable Service)
- Installation
- Connection Object
- Premise
- Device
- Invoice
- Payment

13 Email Response Management System

- i. Email based communication with customer to be recorded.
- ii. Tracking and trailing of email sent and received.
- iii. Creation of service request based on email received by customer.
- iv. Acknowledging customer email.
- v. Assigning emails to concerned team.
- vi. Reports to be generated for email management.
- vii. Sequential reporting of email communication with customer.



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14 Field Force Management

- i. Work order management like assigning of tasks to field operators.
- ii. Real time data collection in centralised way.
- iii. Inventory management can help track inventory levels and automate the restocking process.
- iv. Asset management can help maintain assets by scheduling the service requests.
- v. Customer service can help customers by providing real time updates to customers at their doorstep.
- vi. Provision to upload picture/ click live picture at site if required.
- vii. Assigning task to field agent nearest to the incident point and tracking there busyness.
- viii. Notifications to agent and customer as well regarding the customer complaints.
- ix. Rating of Technician to be captured based on performance rating by customer.
- viii. Meter Installation report, JMR report has to be system generated.

15 Contact Centre Automation

- i. Improved customer experience: CRM can provide agents with a 360-degree view of the customer's history, preferences, and needs.
- ii. Streamlined data management: Integrating call centre operations with CRM can eliminate the need for manual data entry and reduce the risk of errors.
- iii. It could also ensure that customer data is consistent across all systems, which can improve data quality and reduce data duplication.
- iv. Creation of service requests and tracking of old open/completed service requests.
- v. Relevant customer details to be fetched while incoming call.
- vi. Alerts to be configured at agents screen.
- vii. Provision to send Bills to customer via Email or SMS.
- viii. There should be FAQs to help agent resolve customer query quickly.
- ix. Knowledge articles to be available for user help.
- x. Knowledge articles of case studies of similar cases.
- xi. Provision to send latest payment receipt to customer via E-mail.

16 Alerts and Reminder management

- i. Pop up or top screen alert to agent about customer's status like, Active, Disconnected, Defaulter.
- ii. Pop up or top screen alert to agent about kind of customer like, VIP, VVIP, IGL employee or GAIL BPCL employee.
- iii. Alert for payment dues of the customer if any.

17 User Training and hands on session

- i. Bidder (s) will train IGL core development team about customization , configuration, migration and integration of proposed solution
- ii. Bidder(s) will train IGL functional team on overall capabilities, configuration, migration & troubleshooting.

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- iii. Post Go Live, Bidder (s) will have in depth Knowledge sharing sessions with IGL team on the developments done, logic, configuration etc. and handover all documents related to design, configuration & customization to IGL team.
- iv. Bidder will involve in end user training (Train the trainer concept) and provide detailed training on operations, reports & dashboards, basic troubleshooting to IGL Power users. Bidder(s) will prepare detailed end user training document with necessary screen shots and steps of each process mapped in proposed solution Defining the training plan and identifying the key features and functions of new application.
- v. Develop training plan such as training format, classroom workshops, online or on job training.
- vi. Providing user with the study material of the new application features.
- vii. It is essential that a user-friendly training manual is made available on the IGL intranet for each workflow to ensure ease of use and seamless adoption of the system by employees.

18 Documents upload and download Management

- i. After integration with ECM uploading and downloading of documents to be managed
- ii. Authorised User access to documents uploaded
- iii. Categorisation of types of documents being uploaded like (Aadhar card, pan card, address proof, Annexures, NOC etc.)
- iv. Generation of Registration form and preserve in ECM.
- v. Restriction of size of document to be uploaded.
- vi. Types of files of documents can be uploaded like (JPEG, PDF etc)
- vii. Restriction to enable document only when required.

19. System Availability

- i. During Disaster, DR system should cover 100% demands as production system.
- ii. System availability shall be greater than 99.9 % at all times.
- iii. System should be able to cater below mentioned concurrent users:
 - 400 CRM Users
 - 10000 IGL Customer Users
 - 1000 Field Force Users

20 Push notification to customers via in app notification, SMS, Email, WhatsApp

- I. To send SMS, E-mail and WhatsApp notifications to customers
- II. Updates of service request status to customer
- III. Sending feedback to customer regarding engagement with IGL
- IV. Sending emergency requests notification to Control room Incharge and zonal Incharge.