

Selection of Consultants

Technical Assistance Mission

Customer Relationship Management

For ECLOF Kenya

February 2020

With the Support of



No. ECLOFK/01/2020/KEN/AF

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Section 1. Letter of Invitation

Montrouge, February 28, 2020

Dear Sir or Madam:

1. The Grameen Credit Agricole Foundation (hereinafter called ‘the client’) has received funding (hereinafter called “the funds”) from the French Development Agency (hereinafter called “the Agency”) toward the financing partly the cost of Technical Assistance mission in the framework of the African Facility and intends to apply a portion of the funds to eligible payments under the contract for which this Request for Proposals is issued.
2. The Foundation now invites proposals to provide the following consulting services: Customer relationship management training for Eclaf Kenya. More details on the services are provided in the Terms of Reference.
4. A firm will be selected under selection based on consideration of quality and cost (SBQC) and procedures described in this RFP.
5. The RFP includes the following documents:
 - Section 1 - Letter of Invitation
 - Section 2 - Instructions to Consultants (including Data Sheet)
 - Section 3 - Technical Proposal - Model Forms
 - Section 4 - Financial Proposal - Model Forms
 - Section 5 - Terms of Reference

Yours sincerely,

Violette Cubier, Programme Manager – Technical Assistance & Microinsurance

Instructions to Consultants

DATA SHEET

Paragraph Reference	
1.1	<p>Name of the Client: <u>Grameen Credit Agricole Microfinance Foundation represented by Violette Cubier, Programme Manager, Technical Assistance & Microinsurance</u></p> <p>Method of selection: <u>selection based on consideration of quality and cost (SBQC)</u></p>
1.2	Designation, objectives and brief description of the assignment are as follows: <u>Customer Relationship Management, ECLOF Kenya</u>
1.3	The Client will provide the following inputs and facilities:
2.1	<p>Clarifications may be requested not later than <u>2</u> days before the submission date.</p> <p>The address for requesting clarifications is: <u>Violette Cubier, Fondation Grameen Crédit Agricole, 72 rue Gabriel Péri, 92120 Montrouge, France</u> <u>Tel: +33 1 43 23 47 02</u> <u>E-mail: violette.cubier@credit-agricole-sa.fr</u></p>
3.1	Proposals shall be submitted in the following language: <u>English</u>
3.3 (i)	The estimated number of professional staff-days required for the assignment is: <u>20 days of presential training + preparatory work and post-training report</u>
3.3 (ii)	The minimum required experience of proposed professional staff is: <u>5 years of experience in customer relationship management in financial institutions</u>
3.3 (iii)	Reports that are part of the assignment must be written in the following language(s): <u>English</u>
3.4 (vii)	Training is a major component of this assignment: <u>Yes</u>
3.8	Consultants shall state their price component for cost incurred in Euro and if necessary in local currency. Consultants who intend to incur cost in other

Section 2 – Instruction to consultants

	currencies for the assignment may state the corresponding price component in Euros.																												
3.10	Proposals must remain valid 60 days after the submission date.																												
4.3	Consultant must submit an electronic version of the Proposal.																												
4.5	The Proposal submission address is: violette.cubier@credit-agricole-sa.fr and ami.faciliteafricaine@credit-agricole-sa.fr Proposals must be submitted no later than the following date and time: <u>March 13, 2020, 6:00pm CET</u>																												
5.1	The address for contacting the Client is: <u>Violette Cubier, Fondation Grameen Crédit Agricole, 72 rue Gabriel Péri, 92120 Montrouge, France</u> <u>Tel: +33 1 43 23 47 02</u> <u>E-mail: violette.cubier@credit-agricole-sa.fr</u>																												
5.3	Criteria, sub-criteria, and point system for the evaluation of Technical Proposals are: <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;"></th> <th style="text-align: right; width: 20%;"><u>Points</u></th> </tr> </thead> <tbody> <tr> <td>(i) Specific experience of the Consultants relevant to the assignment:</td> <td style="text-align: right;">[5 - 10]</td> </tr> <tr> <td>(ii) Adequacy of the proposed methodology and work plan in responding to the Terms of Reference:</td> <td></td> </tr> <tr> <td style="padding-left: 20px;">a) Technical approach and methodology</td> <td style="text-align: right;">[30]</td> </tr> <tr> <td style="padding-left: 20px;">b) Work plan</td> <td style="text-align: right;">[10]</td> </tr> <tr> <td style="padding-left: 20px;">c) Organization and staffing</td> <td style="text-align: right;">[10]</td> </tr> <tr> <td style="text-align: right;">Total points for criterion (ii):</td> <td style="text-align: right;">[20 - 50]</td> </tr> <tr> <td>(iii) Key professional staff qualifications and competence for the assignment:</td> <td></td> </tr> <tr> <td style="text-align: right;">Total points for criterion (iii):</td> <td style="text-align: right;">[30 - 60]</td> </tr> <tr> <td>(iv) Suitability of the transfer of knowledge (training) program: [0-10]</td> <td></td> </tr> <tr> <td colspan="2" style="border-top: 1px dashed black; height: 10px;"></td> </tr> <tr> <td>(v) Participation by nationals among proposed key staff</td> <td style="text-align: right;">[0 – 10]</td> </tr> <tr> <td style="text-align: right;">Total points for the five criteria:</td> <td style="text-align: right;">100</td> </tr> <tr> <td colspan="2">The minimum technical score St required to pass is: <u>60</u> Points</td> </tr> </tbody> </table>		<u>Points</u>	(i) Specific experience of the Consultants relevant to the assignment:	[5 - 10]	(ii) Adequacy of the proposed methodology and work plan in responding to the Terms of Reference:		a) Technical approach and methodology	[30]	b) Work plan	[10]	c) Organization and staffing	[10]	Total points for criterion (ii):	[20 - 50]	(iii) Key professional staff qualifications and competence for the assignment:		Total points for criterion (iii):	[30 - 60]	(iv) Suitability of the transfer of knowledge (training) program: [0-10]				(v) Participation by nationals among proposed key staff	[0 – 10]	Total points for the five criteria:	100	The minimum technical score St required to pass is: <u>60</u> Points	
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5.7	The single currency for price conversions is: <u>Euro</u>
5.8	In case of SBQC, the formula for determining the financial scores is the following: $S_f = 100 \times F_m / F$, in which S_f is the financial score, F_m is the lowest price and F the price of the proposal under consideration. The weights given to the Technical and Financial Proposals are: $T = 0.8$, and $P = 0.2$
6.1	Address for contract negotiations: <u>Violette Cubier, Fondation Grameen Crédit Agricole, 72 rue Gabriel Péri, 92120 Montrouge, France</u> <u>Tel: +33 1 43 23 47 02</u> <u>E-mail: violette.cubier@credit-agricole-sa.fr</u>
7.2	Expected date and location for commencement of consulting services: <u>April 1, 2020</u>

Section 3. Terms of Reference

A. BACKGROUND AND RATIONALE

With the anticipated business growth supported by technological advancement that ECLOF Kenya has experienced in the recent past, it is inevitable that all staff require to up-scale their customer relationship skills for outstanding customer experience. It is also crucial to note that customers are more interested with the experience they get from the service provider than the service itself as an irrefutable characteristic of the 21st Century customer. Upscaling our customer relationship management skills will therefore place us at a vantage point in the wake of high competition in the current market.

ECLOF Kenya as one of the middle tier expanding Credit only Microfinance Institution in Kenya with a clientele of over 55,000 clients who are involved in diversified income generating activities is strategically positioned to influence livelihood of women and men in the ratio of 60%:40% respectively both in the rural and urban areas. Moreover, economic, social, technological landscapes have significantly changed and as such there is need to on-board customers and retain them through their unmatched experience with us. This calls for the need to build staff capacity for business growth and continuity. This would increase efficiency and boost the productivity via complete paradigm shift in how we relate with our customers.

B. PROJECT OBJECTIVES

1. To increase customer loyalty and customer retention.
2. To ensure customer centricity both at sale and after the sale and promote efficiency in providing all our services.
3. Enhance staff with conflict management skills and problem solving skills.
4. Develop effective communication skills.

C. EXPECTED RESULTS

- Enhanced customer relationship management for a 20% increase in client retention
- Better Internal Communication for excellent customer service.
- Optimized marketing for better product mix.
- Sustained high quality portfolio at <5% PAR.
- Growth of our earning asset to 2.4 billion
- Ensure effective business continuity.

D. PROJECT DELIVERABLES

1. Two days training in customer relationship management for all staff members in ECLOF Kenya Limited.

2. Through coverage of all the topics regarding customer loyalty, communication,
3. Training evaluation forms duly filled
4. Training reports for each area two weeks after the training.
5. Attendance list for all regions for the two days.

E. SCOPE OF WORK

The following areas to be covered very comprehensively.

- To increase customer loyalty and customer retention.
- To ensure customer centricism both at sale and after the sale and promote efficiency in providing all our services.
- Enhance staff with conflict management skills and problem solving skills.
- Develop effective communication skills.

F. PROJECT TIMELINES

The CRM training will be covered between the 8th May to 18th July.

	REGION	TOWN	DATES
	MT KENYA/COAST	THIKA	8 & 9/5/2020
	HEAD OFFICE	NAIROBI	11 & 12 /5/2020
	UPPER EASTERN		15 & 16/5/2020
	NAIROBI		22 & 23/5/2020
	CENTRAL RIFT		5 & 6/6/2020
	NYANZA		12 & 13/6/2020
	HEAD OFFICE		15 & 16/6/2020
	WESTERN		19 & 20/6/2020
	N/RIFT		10 & 11/7/2020
	S/RIFT		17 & 18/7/2020

G. QUALIFICATIONS

1. Demonstrate experience and success in delivering Customer Relationship Management
2. Experience of training in Microfinance
3. Fluent in English as the main language of communication,
4. Good communication and interpersonal skills.