

REQUEST FOR PROPOSAL

For

Website Designing, Development & Maintenance



aapke vaade,
sar aankhon par

Issue Date : 30-Apr-2018

Last Date for submission of proposal : 10-May-2018

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1.0 INTRODUCTION AND SCOPE

Canara HSBC Oriental Bank of Commerce Life Insurance Company Limited (“Company”) is carrying on life insurance business in India. As part of supporting its Marketing and Brand promotion, the Company is looking to engage service providers for significant Website Designing, Development & Maintenance for which this RFP is being issued.

1.1 Purpose

The purpose of this RFP is to inform potential Bidders of a business opportunity and to solicit proposals for Website Designing, Development & Maintenance as per requirements of the Company. Based upon the review and evaluation of proposals offered in response to this RFP, Company may at its sole discretion negotiate and enter into contracts with one or more successful Bidders. As such there will be no volume commitment for the services to be delivered under this RFP by the shortlisted bidder.

Notwithstanding any other provision herein, Bidder participation in this process is voluntary and at Bidder's sole discretion. Company reserves the right to accept or reject any or all bids from a specific or multiple Bidders for any reason at any time. Company also reserves the right at its sole discretion to select or reject any or all Bidder(s) in this process and will not be responsible for any direct or indirect costs incurred by the Bidders in this process.

1.2 Request for Proposal Definitions

Throughout this Request for Proposal, the following definitions are used:

- “Bidder” means a company incorporated under the Companies Act 1956, or a partnership firm (or such other entities or body of individuals/association) that submits, or intends to submit, a proposal in response to this “Request for Proposal”;
- “Service Provider” means the Bidder(s) awarded a Contract resulting from this RFP;
- “Contract” means the agreement formed between the Company and the successful bidder as evidenced by an Agreement issued to the Company;
- “Contract Documents” means the Agreement, the Bidders proposal document, the RFP and such other documents as listed in the Agreement, including all amendments or addenda agreed between the parties;
- “Must”, “mandatory” or “required” means an absolute minimum function or capacity, which, if not satisfied in the proposal, may result in disqualification in the final evaluation;
- “RFP” means this request for proposal including any amendments, attachments, and/or clarifications pertaining to this RFP that may be issued prior to the closing date; and,
- “Should”, “may” or “is desirable” means desirable but not mandatory functions or capacities. Bidders who are able to provide these functions or capacities may be evaluated more favorably than those who cannot. However the final decision shall rest with the company.

2.0 Terms of the RFP

2.1 Acknowledgement

Company is releasing this RFP for Website Designing, Development & Maintenance online on its website (www.canarahsbclife.com) and on e-procurement website (www.canarahsbclife.abcprocure.com) with the sole aim of making the process free, fair & transparent and user friendly.

The Bid (as per formats) duly sealed and super scribed “**Response to RFP – Website Designing, Development & Maintenance**” should be addressed to **Shaikh Qutubuddin, Canara HSBC Oriental Bank of Commerce Life Insurance Company Ltd, 2nd Floor, Orchid Business Park, Sector-48, Sohna Road, Gurgaon - 122018, Haryana (INDIA).**

Please note that the Technical and Commercial bid has to be in separate sealed envelopes duly marked as **Technical Bid and Commercial Bid** respectively. Company is not responsible for non-receipt of quotations by the specified date and time due to any reason including holidays. All questions / clarifications should be communicated only on email id akanksha.gangvany@canarahsbclife.in & kaustav.mukerji@canarahsbclife.in marking a copy to shaikh.qutub@canarahsbclife.in and procurement@canarahsbclife.in. Quotations received after the stipulated time or the Due date or incomplete in any respect are liable to be rejected without any prior notice.

Kindly note below the complete details of our organization

Name	- Canara HSBC Oriental Bank of Commerce Life Insurance Co. Ltd.
Regd. off. address	- 208, 2nd Floor, Kanchenjunga Building, 18 Barakhamba Road New Delhi - 110001
Corporate Identity no.	- U66010DL2007PLC248825
Telephone no.	- +91 0124 4535500
Fax no.	- +91 0124 4535999
E-mail	- customerservice@canarahsbclife.in
Website address	- www.canarahsbclife.com

2.2 Proposal Deadlines

Pre-bid meeting: A pre-bid meeting to give any clarifications will be held at the Company’s office on **04-May-18 (11 AM- 11.45 AM)**. Bidders are welcome to attend the meeting at our **Gurgaon** office and ask their questions in an open forum at the appointed time and venue. Preferably Bidders should send all their queries/clarifications 2 days in advance and confirm participation on pre bid meeting 1 day in advance. All queries and their answers will be put on the Company’s website and will be part of this bid document.

Bid Submission: Company must receive duly completed and signed proposals in the manner prescribed no later than **10-May-18**.

2.3 Company's Obligations

The submission and receipt of proposals does not obligate the Company in any way to commit to any Bidder(s). The Company shall not be liable for any costs incurred by Bidders in the preparation, presentation or any other aspect of the proposals received by reason of this request, nor is Company obligated to negotiate separately with any sources whatsoever in any manner necessary to serve Bidder's best interests. Company makes no representation, implied or express, that it will accept and approve any proposal submitted. Any and all Contracts which result from this RFP shall be non-exclusive, non-commitment, as-ordered agreements. Company shall not have any liability to bidders for any interruption or delay in access to the website to obtain the RFP document/details irrespective of the cause. Company will also not be responsible for any damages, including damages that result from, but are not limited to negligence. Also Company will not be held responsible for consequential damages, including but not limited to systems problems, inability to use the system, loss of electronic information etc.

2.4 Proposal Evaluation

Proposals submitted may be reviewed and evaluated by any person at the discretion of Company's internal evaluation team, including non-allied and independent consultants retained by Company now or in the future for the sole purpose of obtaining evaluations to proposals.

The Company may, at its sole discretion, negotiate and enter into contracts with one or more successful Bidders for the said services.

Bidders may be asked to further explain or clarify areas of their proposal in writing during the evaluation process.

The evaluation will be done in two stages:-

Stage 1: - Stage 1 consists of two parts as follows:

i) Technical Evaluation - Technical evaluation for the proposed solution via documentation provided. Post technical evaluation, only shortlisted bidders may be called for detailed presentation.

ii) Presentation – Detailed Presentation from the services (presentation should include case studies, work samples, company credentials, competition benchmarking, proposed service solution, proposed methodology etc.). Site visit by the Company will be part of the selection process. The Presentation should cover the following elements.

Stage 2: - Commercial evaluation of the bid - Technically shortlisted bidders (Stage-1) will be consider on the commercial evaluation.

The only information regarding status of the evaluation of proposals that the team will give to any inquiring Bidder shall be whether or not that Bidder has been awarded a Contract. The Company may, at its sole discretion, inform any inquiring Bidder of the reason(s) why it was not awarded the bid.

The Company reserves the right to conduct a reverse e-auction after the completion of the RFP process, the schedule of which will be intimated later to all the pre-qualified bidders. All Bidders must confirm if they are

willing to participate in the reverse auction and if they have necessary digital signatures required for the purpose.

2.5 RFP Terms and Conditions Applied to Final Contract

The terms and conditions of the RFP, including the specifications and the completed proposal, will become, at Company's sole discretion, part of the final Contract (the "Contract") between Company and the selected Bidder. In the event that responses to the terms and conditions will materially impair a Bidder's ability to respond to the RFP, Bidder should notify Company in writing of the impairment. If Bidder fails to object to any condition incorporated herein, it shall mean that Bidder agrees with, and will comply with the conditions set forth herein.

Any exceptions to the terms and conditions or any additions, which Bidder may wish to include in the RFP, should be made in writing and included in the form of an attachment to the applicable Section in the RFP.

2.6 Terms Binding on Bidder

Following the date for submission of proposals, and prior to Contract award, the RFP shall be binding upon Bidder in all respects for a period of 180 days.

2.7 Hold Harmless

In submitting a proposal, Bidder understands that Company will determine at its sole discretion which proposal, if any, is accepted. Bidder waives any right to claim damages of any nature whatsoever based on the selection process, final selection, and any communications associated with the selection.

Company reserves the right to award the Contract to the Bidder(s) whose proposal is deemed to be the most advantageous in meeting the specifications of the RFP. In addition, Company reserves the right to add or waive any requirements contained in this RFP at its sole discretion with regard to proposals submitted. Company's decision on award of Contract shall be final and binding on all the Bidders.

Company shall be at liberty to cancel the RFP / reverse auction process at any time, before ordering, without assigning any reason.

2.8 Confidentiality Provision

The terms of this RFP, the information provided by the Company herein and all other information provided by Bidder in connection with the services offered to be provided by the Bidder pursuant to this RFP, are to be treated by Bidder as strictly confidential and proprietary. Such materials are to be used solely for the purpose of responding to this request. Access shall not be granted to third parties except upon prior consent of Company and upon the written agreement of the intended recipient to treat the same as confidential. Company may request at any time that any of Company's material be returned or destroyed.

Should Bidder choose not to respond to this RFP, please return all materials and any duplicates thereof at:

Title: RFP for "Website Designing, Development & Maintenance "
Kind Attn: Shaikh Qutubuddin
Canara HSBC Oriental Bank of Commerce Life Insurance Company Ltd.
2nd Floor, Orchid Business Park,
Sector-48, Gurgaon
Haryana (INDIA) 122018

2.9 Sub-Contracting

The services offered to be undertaken in response to this RFP shall be undertaken to be provided by the Bidder directly employing their employees, and there shall not be any sub-contracting, franchisee, contract to hire, consultant etc. arrangement done by the Bidder. The deputed person should be only on bidder rolls.

2.10 Acceptance of Proposals

Company reserves the right to modify the terms of the RFP at any time at its sole discretion and the same will be uploaded on the website <http://www.canarahsbclife.com>. The bidders have to remain updated about the same from the website and Company will not be responsible for such information not being downloaded by the bidder. Subsequent to the submission of proposals, interviews and negotiations may be conducted with one or more Bidders, but there will be no obligation to receive further information, whether written or oral, from any Bidder not to disclose the nature of any proposal received.

This RFP should not be construed as an agreement to purchase products or services. Company is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed in accordance with the evaluation criteria.

a) The bidder is required to voluntarily disclose at the time of bidding if any of its sister concerns/group companies/relatives are directly or indirectly participating in this RFP.

b) All quotes to be supported by Copy of Pan Card, Certificate of incorporation, GST registration detail and address proof.

c) Company reserves the right to terminate the Agreement/ Contract in case Service Provider gets blacklisted by any other organization/Department of Government of India or State Governments during the course of supply of material or services, if Service Provider is convicted in a legal/tax evasion case or on account of any other legal misconduct of the Service Provider, unsatisfactory past performance, corrupt or fraudulent practices, any other unethical business practices.

d) The bidder shall disclose if any of the bidder(s) are sister concerns/group companies/associates/affiliate entities or any of such entities employees/directors/shareholders are applying for this RFP/RFP process. Further the Service Provider shall disclose if any of its sister concerns/group companies/associates/affiliate entities or any of such entities employees/directors/shareholders are related to the Company and/or to its employees/directors/shareholders.

e) Please submit the flowing document along with proposal.

Vendor Registration form. Duly filled Service Provider profile form along with the document mentioned above in point no. b

The bidder is required to voluntarily disclose at the time of bidding if any of its sister concerns/group companies/relatives are directly or indirectly participating in this RFP.

Duly filled Non-Disclosure Agreement to be printed on non judicial stamp paper of Rs 100/- and signed. Same should be part of the response document.

2.11 Evaluation and Selection

A committee will evaluate proposals against the mandatory criteria as detailed herein. Proposals meeting all the mandatory criteria will then be assessed and scored against the evaluation criteria. Company's decision on evaluation shall be final and binding on all the bidders. Bidders who qualify the evaluation criteria will be empanelled for services. Commercial bids will be asked from the qualifying bidders post technical evaluation. Any deviations from the skill set / experience / prerequisites/ requirements and/or the terms and conditions of the Tender Document shall be submitted explicitly along with convincing reasons in the format attached (refer Clause 5.1). Company will not provide any justification in case it rejects the deviation and Company reserves all rights to reject or accept any deviation.

In case the Bidder intends to notify any grievance or concerns pertaining to the fairness of the complete process including but not limiting to bid submission or selection of Service Provider then the Bidder may send an e-mail at **whistleblower@canarahsbclife** giving requisite details for seeking any clarification.

2.12 Liability for Errors

While Company has used considerable efforts to ensure an accurate representation of all the details as is required for the proposed services, the information contained in this RFP is supplied only as a guideline for Bidders. The information is not guaranteed or warranted accurate by Company, nor is it necessarily comprehensive or exhaustive.. In the event Company finds that the objectives of the intended outsourcing is better achieved by processes/procedures other than those mentioned in this document, Company shall have the right irrespective of the fact whether it has already received proposals from intending bidders or not, to effect such changes and enter into negotiations with one or more Bidders at its sole discretion for such changed/modified processes.

2.13 Acceptance of Terms

All the terms and conditions of this RFP shall be deemed to be accepted by the Bidder and incorporated in its proposal unless specifically notified otherwise.

2.14 Ownership of Proposals

All documentation, including proposals, submitted to Company will become the property of Company.

2.15 Use of Request for Proposal

This document or any portion thereof, is the property of Company and may not be used or copied for any purpose other than the submission of the Bidder's proposal.

2.16 RFP Schedule

- Company advertises RFP on its website **30-Apr-18**
- All inquiries/clarifications regarding RFP **04-May-18**
- Pre-Bid Meeting **04-May-18 (11 AM)**
- Bidders' deadline for submitting responses to RFP **10-May-18**
- Company informs final selection to bidders **TBD**

2.17 Delay in performance of the obligations by the Bidder

The short listed Bidder(s) must strictly adhere to the schedule, specified in the agreement to be executed between the Company and the Bidder(s) for performance of the obligations arising out of the agreement and any delay will enable Company to resort to any or both of the following:

- i. Time and date stipulated for completion of work is the essence of the contract.
- ii. If any part of the contract is not satisfactorily remedied within reasonable time, Company may proceed to do the work at Bidder's risk and expenses without prejudice to any other contractual rights, which Company may have against Bidder in respect of any such non performance.

3.0 Proposal Preparation

This section defines the proposal preparation and submission procedures, which are to be followed by all Bidders. Bidders are cautioned to carefully read and follow the procedures required by this RFP. Please note that deviations may be cause for rejection of your proposal.

3.1 Proposal Format

The Bid (attached formats) duly sealed and super scribed “**RFP Response – Website Designing, Development & Maintenance**” for Company should be addressed to **Shaikh Qutubuddin , Canara HSBC Oriental Bank of Commerce Life Insurance Company Limited, 2nd Floor, Orchid Business Park, Sector-48, Sohna Road, Gurgaon - 122018, Haryana (INDIA).**

Please note that the Technical and Commercial bid has to be in separate sealed envelopes duly marked as **Technical Bid and Commercial Bid** respectively. Company is not responsible for non-receipt of quotations by the specified date and time due to any reason including holidays. All questions / clarifications should be communicated **only** on email id akanksha.gangvany@canarahsbclife.in & kaustav.mukerji@canarahsbclife.in marking copy to procurement@canarahsbclife.in, & shaikh.qutub@canarahsbclife.in. Proposals received after the stipulated time of the Due date or incomplete in any respect are liable to be rejected. As part of the Bid documents, the Bidder shall provide among other details, the following information and shall also adhere to the instructions mentioned below:

- a) Bidder's name and address, Bidder's telephone number, email address and a contact person.
- b) One page letter of introduction identifying the Bidder and signed by the person or persons authorised to sign and bind the Bidder to statements made in the proposal. The returned RFP will be referenced as an attachment if/when a contractual agreement is executed. This document has to be uploaded and mapped with this corresponding schedule.
- c) Please follow the format of this RFP, placing answers in the text box immediately after sections requiring responses. Please do not enter any information into any part of this document other than the boxes provided. The boxes will expand to accommodate responses of any length.

- d) NO CHANGES TO THE LINES, FORMAT OR STRUCTURE OF ANY SPREADSHEETS IS PERMITTED. CHANGING THE SPREADSHEETS IN ANY WAY, OTHER THAN INSERTING THE REQUIRED INFORMATION, SHALL BE CONSIDERED CAUSE FOR YOUR COMPANY'S DISQUALIFICATION FROM FURTHER ANALYSIS AND PARTICIPATION IN THE RFP PROCESS.
- e) Any additional information, brochures, etc., can be provided at the discretion of the Bidder and should be clearly labelled and uploaded.
- f) Bidders are requested to submit the draft agreement copy along with the RFP response.

3.2 Notification of Changes

All recipients of this RFP will be notified of any changes if any made to this document prior to the due date of submission of proposals.

3.3 Changes to Proposed Wording

The Bidder will not be permitted to change the wording of its proposal after submission to Company. No words or comments will be added to the general conditions or detailed specifications unless requested by Company for the purposes of clarification.

3.4 Bidder's Expenses

Bidders are solely responsible for their own expenses in preparing and submitting a proposal to Company, if any.

3.5 Completeness of Proposal

By submission of a proposal, the Bidder warrants that all components required to manage the program have been identified in the proposal or will be provided by the Company at no charge.

3.6 Sub Contracting

The services offered to be undertaken in response to this RFP shall be undertaken to be provided by the Bidder directly employing their employees, and there shall be no sub-contracting done by the Bidder.

4.0 Scope

Detailed scope shall be as per Annexure-I.

4.1 Business Continuity:

The Service provider shall mandatorily have a Business Continuity strategy in place.

The same will be taken into consideration as part of the Technical Evaluation.

4.2 Information Security:

Information security requirements shall be put in place by the service provider to ensure protection of confidential information of the Company and its policyholders from intentional / inadvertent disclosures to the unauthorized persons.

The Service Provider shall provide details of their Information Security and the same will taken into consideration as part of the Technical Evaluation.

The Service Provider shall be required to comply with information security directives/changes issued by the Company from time to time.

4.3 Fraud:

The Service Provider shall provide details of their Anti-Fraud controls and the same will taken into consideration as part of the Technical Evaluation.

4.4 Criteria

The purpose of this section is for Bidders to provide information to demonstrate to Company that its services offering satisfy Company's requirements.

The bidder should also demonstrate that it has the financial and organizational infrastructure to fulfil the fundamental requirements set out in this RFP. Bidders not meeting them or not demonstrating that they do meet them may not receive further consideration during the evaluation process.

4.5 Minimum Eligibility Criteria

Bidder is expected to provide response specifically to minimum eligibility criteria"s and support the same with necessary documentation, wherever applicable.

- a) Bidder should be a Company incorporated under the Companies Act. 1956.
- b) Bidders must have a valid GST Number & PF Establishment Code issued by the PF Commissioner and other applicable licenses and certificates.

The Bidding organizations must comply with the above mentioned criteria. Non compliance of any of the criteria will entail summary rejection of the offer.

Wherever applicable photocopies of relevant documents / certificates must be submitted as proof in support of the claims made for each of the above mentioned criteria. Company reserves the right to verify / evaluate the claims made by the Bidding Organizations independently.

4.6 Pricing Model

The prices have to be submitted in sealed envelopes as per the format given in **Annexure III**.

5.0 Intent

Please find attached the detail scope of activities proposed to be outsourced, as per Company's current understanding of the processes.

5.1 Deviation Sheet

Deviations from Technical Specifications and Terms and Conditions of the Tender

Sl No	RFP Document Clause	Technical Specification or Terms and Condition in the RFP document	Deviation offered	Reasons and whether deviation adds to the operational efficiency in case of the systems
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Note:

Deviations from any of the terms and conditions of the tender document should be specified

If any deviations from the technical specifications are warranted, reasons for such variations should be specified and if such deviations/ variations add to improvement of the overall performance of the systems, those should be specifically mentioned and supported by relevant technical documentation as specified above.

5.2 Compliance

If there is any deviation reported in managing IT Software & Hardware inventory, 100% software or hardware cost would be charge from the monthly payment.

5.3 Contract

The Contract / Agreement to be signed with the selected bidder(s) shall be as per the format of the Company.

Annexure-I

Scope of Work

Canara HSBC Oriental Bank of Commerce Life Insurance is looking for a vendor who has capabilities in the area of building a corporate website and a content management system for the organization. The vendor will be responsible for **designing, developing and maintaining** the website – this will include information architecture, user interface design, user experience mapping, content development, and execution.

The Company is looking for an effective website which will enable us to do the following:-

- To promote and market products and services of the organization (Canara HSBC Oriental Bank of Commerce Life Insurance Company).
- Provide secured access to organization information/services and facilitate customer to interact with organization to submit request, view application and track the status.
- Design to be attractive, responsive, latest technology based and should facilitate availability of information with minimum clicks with logical and intuitive flow.
- Content Management System to be implemented (customized wherever need be). Adding, modifying and deleting information to be easy and integrated with easy to use content management system. CMS to have Multi Lingual Support (initially English and Hindi will be required).
- Design and incorporate Blog as part of the website ecosystem which helps in boosting SEO results.
- Website to be revamped with latest technology and optimized for better Search engine results and it has to have interactive web pages and provision to have chat facility, online demo/video and integrate with social media like Facebook, Twitter, LinkedIn, YouTube, Instagram etc. Sharing of pages / Posting option from website to be available to visitors as per Canara HSBC Insurance Company requirement.
 - SEO Friendly URLs and Onsite Optimization of the website to be done by the vendor.
 - Migrate all existing pages including content as well as database after redesign and reformat as per requirement. Re-writing of the website content should also be a part of the scope.
 - Loading time should not be more than 4 seconds.
 - Site Search - Ability to search entire site and content
 - Website should be compatible in all major OS Platform (Mac OSX, Windows OS and Linux) and Browsers compatible with latest and previous 3 versions (Chrome, Safari, Firefox and IE)
 - The delay in website response for viewing above 0.5 second shall be considered as deficiency of services and Canara HSBC Insurance Company may take suitable action which may lead to termination of the contract.
 - And all other points that may result/come as recommendation from site audit and best practices
- It should be ensured that any 3rd party tool being used, should be compatible with technology stack provided below.
- Suggest and create tools & calculators, keeping in mind the competition and company's long term online strategy. Like, Expenditure Manager, Retirement Planner, Financial Planner, Savings Calculator, Investment Planning Calculator, Mortgage Calculator should be included at proper place on website. The logics have to be provided by agency which will incorporated post due diligence.
- Website has current integrations mostly at data level with systems like Customer Portal, ATS etc. Same should continue to work as is.

- Agency may share and help Canara HSBC OBC LI host its website on cloud-based servers depending on feasibility. A thorough strategy (if proposed) and comparison in various cloud based servers to be presented (with Cost based feature analysis) to help shortlist a particular cloud system.

KRA's

- Bidder should incorporate & upgrade the content provided by Canara HSBC OBC Life Insurance Company in a way that is easy to understand, simple and attractive, search engine friendly.
- Also add all social media plug-in tools in website i.e. share, like, quote sharing tool, Facebook messenger send button, and Facebook save button, etc. to share few lines/complete text from web page directly in Facebook or any other social media platform post.
- QR Codes to be generated for various Canara HSBC Insurance Company app and to be included on Canara HSBC Insurance Company website wherever necessary.
- Links of Play store, Pasture, and other such stores should also be present for mobile site visitors.
- Basic design templates (Home / Internal Pages) for our Branch Offices, micro sites, sub-sites to be designed and provided in line with the revamped / newly developed corporate website. (Total number of templates estimated at 150 pages approximately).
- The license for the solution provided, if any, will be required for a maximum of five instances. Costing of licenses, if any, should be factored for not more than five instances.
- Implementation / maintenance of sites other than corporate site to be proposed by bidder as optional line item for each instance. Bidder must complete the implementation and integration of all requirements / components as per Canara HSBC Insurance Company objectives and specifications, as mentioned in this RFP document and requirements emanating during the period of contract.
- The Solution implementation shall be considered formally accepted (commissioned and operationalized) after signing off the Acceptance Test Plan (ATP) document jointly by the Canara HSBC Insurance Company Project Manager and Project Manager of the successful Bidder.
- Successful Bidder will also provide a comprehensive User Acceptance Test (UAT) Plan along with Technical Proposal covering every possible failure/negative scenarios. During Acceptance Test, Bidder shall also demonstrate and provide required documentation for Business Continuity of service in every failure scenarios.
- Bidder will also be responsible to design product management process / operation Manual as per best practices.
- Bidder shall provide post implementation technical support including any new feature, template or device integration e.g. tab / mobile etc..
- Bidder shall also undertake to carry out implementation / operationalization including move, add, and delete changes / customization of such software updates, releases, Version upgrades.
- Bidder should update and maintain all supplied solutions to correctly reflect actual state of the setup at any point in time during the contract period.
- Bidder will also be responsible to provide necessary documentation such as Project Plan, SRS (Software Requirement Specifications), DSD (Design Specification Document), UAT (User Acceptance Testing), Test Plans, DRP (Data Recovery Plan) & BCP (Business Continuity Plan), Installation / Operational Manual, etc.
- Vulnerability Assessment Penetration Testing (VAPT) should be done at least once a year and additionally based on security threat
- Security Audit by Internal as well as External Auditors after UAT is to be carried out by the vendor at its own expenses.

- Vendor should also allow regular security audit of the system by Canara HSBC Insurance Company or its authorized agency as per their requirements and the company to ensure rectification of the audit observations as part of maintenance.
- Any audit/security enhancement proposed by the Government or Law enforcing agency should be carried out by the vendor at no cost to the Canara HSBC Insurance Company.
- Website must be beta tested to Canara HSBC Insurance Company satisfaction before final go live.
- After award of the contract, successful Bidder has to appoint a Project Manager who will be the single point of contact for the Canara HSBC Insurance Company throughout the project cycle. Replacement of Project Manager should be informed to Canara HSBC Insurance Company in 1 month advance.
- Bidder has to provide training to a maximum of ten people as per the requirement at a central location in Gurugram in our premises. Venue for the training will be provided by Canara HSBC Insurance Company. Training period should not be more than a week. The cost of travelling/stay for trainers to be borne by bidder.
- Should be able to revamp and maintain Website of Canara HSBC Insurance Company for the period of five years from the date of implementation on an annual renewal basis.
- Escalation Matrix to be provided by the successful bidder at the start of the project and should adhere to it during the contract period. Any change in escalation matrix structure or contact person should be informed to concerned Canara HSBC Insurance Company Officer immediately.
- Intellectual Property Rights (IPR) should be with the Canara HSBC Insurance Company.
- Bidder has to provide an implant resource for website maintenance who will work from the premises of Canara HSBC Oriental Bank of Commerce Life Insurance Company.

1.1 Functional Requirement

- Study, Analyze and Evaluate the existing website with respect to developing new website (integrating all existing separate components), understand the process, platform, applications and arrive at the gap (gap analysis).
- Website to have below sections apart from standard / mandatory sections of a financial website
 - Static information
 - Dynamic promotional content / banner
 - Product information including demo
 - Online application form etc.
 - Survey / lead generation forms
 - Maps & locators
 - Calculators
 - Tender section
 - Online contest
 - Search options
 - Download option for forms/brochures
 - Request for additional information/enquiry
 - Offline/Online support
 - Photo gallery
 - Video gallery
 - Link for Customer Portal
 - Other websites/micro sites etc

- Designing and developing new web specific creative's viz. static/dynamic banner from Artwork file given by Canara HSBC Insurance Company or create new creative (including buying of image without any copy right issue).
- All menus / sub menus / headings etc. to have an icon and the same should be without any copyright issue.
- The design and development at all stages to adhere to Canara HSBC Insurance Company Branding Guidelines with regards to Font, Color, Text Size etc.
- Migrate existing pages including content as well as database after redesign and reformat as per requirement.
- The website shall have options for multiple level of administrative control having varied rights for all the modules so that they are able to add/modify/remove content through content CMS pertaining to their respective Centre/Domain as per their assigned rights.
- The website shall have provisions of Content Contributor/Creator, Moderator and Approver System wherein authorized individual from Canara HSBC Insurance Company can upload the content on the website pertaining to their Centre/respective domain which after the due approval by the approving authority would be available to the website Manager/Webmaster/Publisher for final uploading onto the website.
- Site should open same in all major OS Platform (Mac OSX, Windows OS and Linux) and Browsers (Chrome, Safari, Firefox and IE).
- Website structure is to be browser independent (Safari, Chrome, Firefox, and Internet Explorer).
- Its feature to include Multi-lingual capabilities, news , announcements, chat facility, multimedia posts, audit trail, site search, photo gallery etc.(all standard features).
- To implement bilingual (Hindi & English) from day one.
- Hindi contents in existing site are in Unicode font.
- Scalability and provision to add more regional languages in future. Costing for English and Hindi languages should be included in the initial implementation cost itself. Addition of any other language (apart from English and Hindi) should be mentioned as optional line item in commercials.
- Adding, modifying and deleting information in the Multilingual Sites to be integrated with content management system to be implemented.
- Bidder should incorporate the content provided by Canara HSBC Insurance Company in a way that is easy to understand, simple and attractive, search engine friendly.
- The CMS should be scalable and have the option to add other languages/features/modules in future.
- Prepare of User, Design & technical manuals and other documents for the developed website in an easy to understandable and User friendly language with proper diagram, screen-shots and charts where ever required.
- The design should organize business logic and presentation logic separately while developing and implementing the proposed system. Thus, restricting the database queries to be inserted inside the presentation and business logic, rather, it should be written in the database only.
- User registration module to be implemented wherein user registers and chooses to get the latest offer details. Website should offer "Demo" to visitors / users. Bidder to cover the workflow during their existing system study. The demo should work on all user access devices.
- A comprehensive Module should be developed for submission of online applications by customers. The Module to have single backend with multiple user levels for all online applications. The online applications of the module to have facility to check eligibility criteria, EMI calculation, Customer interaction with Canara

HSBC Insurance Company & feature to capture leads. e.g. How much Life insurance you need, Insurance calculators like calculate fund value, Calculate premium etc. and capturing the input provided by the customer. The module should have the facility to capture the leads on the basis of the Canara HSBC Insurance Company various products and services and customer requirements.

- The module should be scalable for including online Insurance buying, Premium paying and any other such process launched by Canara HSBC Insurance Company in future. In such scenario, Canara HSBC Insurance Company will share API based interface specification and vendor to coordinate with Canara HSBC Insurance Company team for necessary customization.
- Module to be developed should have the scalability of integration with Canara HSBC Insurance Company CRM, Contact Centre, Email, SMS Systems, Online Policy purchasing etc.
- Website should have capability to capture dynamic data of visitors at various levels (the number of times a visitor visits homepage/WebPages, how much time is spent on each webpage, at what time in day it visits the website, from which device, and any such information related to the visitor) and should act dynamically i.e. displaying the content, email sending, image adaptiveness, sms sending, etc.
- Push notifications facility to be provided for visitors who visit site using mobile, tablet, phablet. Canara HSBC Insurance Company will provide its SMS gateway for pushing the SMSs and website vendor to arrange for necessary interfacing.
- Locator with search facility to be developed for the location based services Like: Branch Finder etc. The Locator should be integrated with Maps / Navigational systems. Canara HSBC Insurance Company will provide LAT-LOG for all locations. MAPS integration required with Canara HSBC Insurance Company services. Locator should ask visitor to detect its location and accordingly detect the current location of visitor and suggest all available nearby options with directions to reach that place. Also a search bar should be included in Locator with floating search option for visitor to search any desired location.
- Calculators such as How much Insurance i need, calculate fund value, Calculate premium etc. and other products with a graphical representation should be included.
- Visitor counter should be provided to the Canara HSBC Insurance Company and website should prompt the visitor its last visited page on website.
- Survey option should be available on website for Canara HSBC Insurance Company to publish and conduct periodical surveys of its visitors. Survey reports should be provided to the Canara HSBC Insurance Company at the end of every survey. The surveys would be enabled based on the requirement of Canara HSBC Insurance Company and the content would be provided by the Canara HSBC Insurance Company.
- Daily Quiz for visitors and Opinion Poll of visitors must also be included in the website. These would be enabled on need basis.
- Option to download, print and share Brochures, Application Forms, Tender Notices, Guidelines and any other similar document must be provided.
- Latest Insurance sector News, Media Coverage of Canara HSBC Insurance Company, Director's Info, Annual Reports, Latest Announcement, Insurance Sector Glossary and similar sections to be included.
- Product Promotion section to be included which will consist of latest offers, campaigns, discounts, etc.
- A subscription module should be made available to visitors wherein one subscribes to receive notifications of new product launched, newsletter, etc..
- Call Back Facility and Call Now feature for visitors interested should be available.
- Web Chat feature should also be made available to visitors and must store all previous conversations of the visitor. Web Chat should every time start from the point where the visitor left last.
- Customer Portal Login for new customer or existing user should be provided from the homepage itself.

- Buy Online module, All plans, Tools and Calculator should be available on website.
- Fund & Nav, Funds Performance, Manage Funds, NAV, Latest NAV, NAV History, Monthly Funds Disclosure, Investment Newsletter, Policy Account Value, Benchmark Yield,
- Investment Team Profile should be available on website.
- MANAGE POLICY, Pay Premium, Policy Details on SMS, Service Requests on Call, Update Your Contact Details, Print Premium Receipt, Track Application, Generate Policy Pack, Turn Around Time, Update Your Aadhaar Number, Update Your PAN Number should be available on website.
- CLAIMS, Claims Process, Get Claim Assistance, Unclaimed Amount, Claim Forms, and Claim Status should be available on website.
- Data Dictionary for all the modules should be maintained and provided to Canara HSBC Insurance Company on quarterly basis.
- Canara HSBC Insurance Company may desire the data output of modules in different formats from time to time as per their requirement. Agency should be able to provide data output in desired format for the modules as and when required by the Canara HSBC Insurance Company.
- Website should comply with the IRDA security guidelines and GOI RBI guidelines.
- All regulatory and mandatory requirements w.r.t website including design, content, functionality or any other technical requirement, which arise during the period of contract and are to be complied by the Canara HSBC Insurance Company should be implemented without any extra cost for entire period of contract.
- The website design needs to follow a new age, contemporary, minimalistic and parallax design style. Need to implement a consistent look and feel across all pages on the website and templatisation. Improve user experiences when interacting with the website through design, navigation etc. Improve information architecture to provide easier navigation and search capabilities.
- Revamped websites shall be WCAG 2.00 AA or above compliant.
- The websites should not only be responsive across all devices (Mobile, Tablet, ipad, Desktop), but should have an adaptive framework for mobile devices.
- Website to be revamped with latest technology and optimized for better Search engine results. This should include
 - Intelligent Search Suggestions
 - Handle SEO Keyword Searches
 - Handle Misspelled Search terms
 - Eliminate Expired Page Errors.
 - Show last search query in Search Box
 - One of its kind searches with identification of multilingual text input.
- Advance Search to be configured with following features
 - Keyword-based and full text search on all content within the website.
 - Predictive search with Auto Complete.
 - Spell Check
 - Search by Categories & Cloud Tags
 - Images along with the results
 - Search within results
 - Ability to recognize synonyms & abbreviations
 - Ability to search for different file types
 - Reporting tool to manage the search results
 - Intelligent ad serving based on keyword input

- Spelling mistake correction (Did you mean)
- Back up of entire website at regular interval will be the responsibility of successful bidder.
- Social media integration, to be implemented to promote or to market Canara HSBC Insurance Company product & service.
- Sharing of pages / Posting option from website to be available to visitors. Installation of FB pixels in Website (suggestive road map to implement it).
- Tag the visitors with their social media profile along with demographics, area of interest and search. Save this data in our database. Also, include share/follow buttons.
- Include visible social media buttons which open our social media pages in new windows. Buttons should be up-to-date.
- Website should be compatible to run on multi server environment for load sharing.

1.2 Content Management System

- The Content Management System (CMS) must be simple to install and easy to maintain and operate, should not need high IT knowledge and expertise.
- Provide and support licensed, easy to use Content Management Solution/System for developing, posting and managing the overall content of the website.
- CMS should have multilingual support and future scalability.
- CMS must be compatible for common browser types.
- CMS system must support non-IT literate users to operate the contents within the overall rules and workflow laid down. This will include creating contents, editing, publishing across all modes including text, video etc. Images and contents should be adaptive and responsive to all formats, browsers, devices, operating systems, screen sizes, resolutions, etc.
- The navigation features must be simple and easy to use.
- CMS must publish contents to multiple formats including PDF, HTML etc. The application must support future/new formats as they arise in the market.
- Application must support ability to add contents/ delete contents/ change contents globally across all pages on the site or on specific areas of the site.
- Movement of approved contents and changes should be automatic/ as per planned and stipulated date and time. Rollbacks should be simple and easy. Workflow must support automation from within including mail/ SMS reminders on due items and actions pending at various levels including appropriate escalations.
- Application should support on demand creation of a "ready to print" copy of the content pages.
- Download and upload features to be supported. Display of content in selected order should be supported. Drag, drop, cut and paste options should be easily supported.
- Archival of part or whole of the site should be supported with easy restoration capability. Usage statistics, high/low, peak traffic etc. should be supported.
- Before updation, CMS to take backup of previous data/version. It should be possible to restore pages and contents from backups or previous versions. Each such updation needs to be recorded and audit trail maintained for any future reference.
- Application must support contents including: HTML, SMTP, XML,
- JavaScript's, DHTML, EXCEL, Word, audio, Movie, graphics, Icons, Psd, ppt, etc.

- CMS should be able to offer the following built-in facilities: Document Management, Event Calendar, Event Management, FAQ Management, Glossary, Polls, and Syndicated Content (RSS).
- CMS should support the Content scheduling web management facilities.
- CMS should be able to provide the following performance features: Advanced Caching, Database Replication, Load Balancing, Page Caching etc..
- CMS should provide the following security features: Audit Trail, Captcha, Login History, Problem Notification and SSL Support.
- CMS should offer the following ease-of-use features: Spell Checker, Glossary and Preview Content before publishing, Font type and size should be uniform across all the pages.
- Admins to receive SMS/E-mail alerts immediately in case of any emergency or unauthorized access.
- The CMS should create SEO-friendly URL's for each and every page. If pages are later moved or renamed, CMS should configure an HTTP 301 Permanent Redirect to notify search engines. The Proposed CMS should do these tasks automatically. Also should have features for users to override such Automatic activities to customized settings. The proposed CMS should have built-in support for SEO like Meta tags, Canonical URLs, extension less URLs.
- The CMS Should build the Sitemap.xml file automatically based the site map created in the CMS.
- The CMS should have a backend with editors previewing personalized pages, which can filter by more than one segment to see how a page will display to users in multiple segments.
- The CMS should have multiple site management to manage a collection of websites and microsites through a centralized interface. The Content authors should be able to easily contribute to multiple websites, or utilize content from other websites. Also CMS should be easily able to share and synchronize Users, roles, content, permissions, and templates between sites.
- The CMS should have a detailed logging of all activities performed by the Backend user on the CMS and features in the Audit trail module to track changes and actions in the system. Also feature to register events such as when a page disappears because it was deleted or moved, when the content of a page is broken due to the widget having been updated, or when an image reference is broken. Also log changes in the configurations.

1.3 UI / UX of the Website

- Ease of usability of the site by the visitors to achieve the objective of user satisfaction/delight.
- Successful Bidder will have to provide the Canara HSBC Insurance Company with different layout options for homepage and internal pages (minimum 3 options to be provided).
- The options provided must be clearly distinct from each other and should not be a modified version of other options provided.
- Bidder should come up with unique, out of the box options distinct from existing website layouts in the market/competition.
- Canara HSBC Insurance Company will decide which option to take forward along with necessary modifications, if required any.
- If no option provided is found good by the Canara HSBC Insurance Company, then the bidder will have to come up with different set of options.
- Canara HSBC Insurance Company will give a go ahead on layouts and other UI/UX features only on its complete satisfaction.

- Number of iterations for modifications can be unlimited until Canara HSBC Insurance Company complete satisfaction.
- If Canara HSBC Insurance Company doesn't like the design/layout/template and other UI/UX features provided by vendor, then Canara HSBC Insurance Company, at its sole discretion, will provide the design/layout/template to the vendor and vendor will have to incorporate these and implement it in the website without any objection.
- Website should be mobile, tablet and similar device compatible (mobile first strategy to be adopted).
- All major browser and platform support.
- Responsive & Retina Ready: Site should be fully responsive and ready for retina displays. Customers should get best user experience of website looks on tablets and mobile devices adapting to the screen size layout.
- Navigation to be simple, easy and intuitive. Customer journey should be defined for every targeted segment.
- Site map should be prepared and made available by the bidder.
- The Site should be fully optimized.
- Design should be such that pages are not cluttered. Intuitive design, (i.e.) customer need not to work hard to find where they need to go. It should have Quick Search option; drop down on home page to enable the visitors to directly navigate the page they choose.
- Images should be used intelligently on home page and in all main sections. Images used should be of high resolution and there should be no copyright issue currently or in future. Icons used should be attractive and self-explanatory.
- Animated effects can be added wherever necessary without hampering the website speed.
- Overlay effect can be added if necessary.
- Parallax Effect & Video Background should be done esthetically to give a smooth transition, easy on eyes and can include videos, put text, images, buttons or other graphical elements for a great looking section.
- RTL Support: RTL (Right-to-left) is fully supported by this theme.
- Modern, trendy with easy to navigate with advanced features to support text, image, audio, video, and combination (multi media) posting.

1.4 Analytics

- Collect and store visitor data, track the new and repeat visitor along with their preferences, pages visited etc, provide forms to collect leads / feedbacks and integrate with Canara HSBC Insurance Company CRM. Prompt the user with their earlier visits. (Bidder to provide bidder agnostic solution for analytics). Automatic acknowledgement to customers / visitors with unique reference number in respect of all online requests. SMS and mail integration for confirmation/ updating status. Selected vendor to enable option for Re-Marketing on the basis of visitor's last search on website.
- SEO analytics for selection of best suitable keywords must be provided.
- SMS/Email and push notifications should be sent to visitors, using Canara HSBC Insurance Company mail/SMS gateway, visiting any product specific page. (Ex: A visitor visiting a page of Insurance product must be sent communications like "We found you were interested in Canara HSBC Insurance Company Product name. For more info contact ____").
- Also, automatic acknowledgement saying thanks and inviting to visit again to all customers registering with us on website should be sent.
- Details of traffic diverted from portals.

- Details of visitors by demographic
 - By average time spent on website.
 - Average time spent on particular webpage.
- Data about Search / Clicks on our website.
- Tag all pages. Tags should be inline.
- Unique page definition
- Use cookies intelligently.
- Validate data is being captured correctly.
- Flash, Flex, RIA, RSS, Videos etc need to be captured.
- Average time spent on website/webpage.
- Comprehensive campaign specific data/services viz. Source of leads / traffic, time stamp, time spend, bounce off rate, SMS/mail integration etc.
- Some ROI measuring tool should be there. Customer Lifetime Value (CLV) should be calculated.

1.5 Scalability

- This is one of the important parameters of this project to have Powerful Admin Panel to allow users to customize theme in an easy and simple way. There should not be any need of coding anything because of the options that are included in the solution to be provided. (Bidder to study existing website, requirements of RFP for work estimates)
- Website, CMS, and other modules provided should be scalable with provision to adopt B2B or any other requirement of Canara HSBC Insurance Company.
- It should have the option of integration with Canara HSBC Insurance Company back end systems like RSS feeds Customer portal, CRM, Contact Centre, Canara HSBC Insurance Company email, SMS Systems, etc. either real time or as required by Canara HSBC Insurance Company.
- Integration with third party application like tax planner, online IT filing, calculators etc. and selected external sites of insurance company, other financial institutions, income tax etc. for smooth access from website.

1.6 Inspection and Testing

- The inspection of installation of services shall be carried out to check whether the services are in conformity with the mentioned in the RFP. The bidder will test all operations and accomplish all adjustments (tuning) necessary for successful and continuous operation of the systems to the satisfaction of Canara HSBC Insurance Company.
- The project will be treated as “complete” only if:
 - User Acceptance Testing (UAT) is completed
 - Handover to the Canara HSBC Insurance Company is completed
 - Final Source code of the project along with detailed documentation and IPR is being transferred to Canara HSBC Insurance Company Software Repository.

1.7 Operational Acceptance

- Successful completion of the contract will be gauged through a series of formal acceptance tests performed on all aspects of the system/sub systems:
- The integration (if any) should be completed before the official launch of the application
- In the phase where the website goes “Live”, Bidder will have to manage and roll out a beta stage where the system will be made available and restricted only to the staff of Canara HSBC Insurance Company through an appropriate mechanism on the web, and conduct user acceptance testing of the System based on test cases developed by the Bidder in consultation with Canara HSBC Insurance Company and validated by Canara HSBC Insurance Company. Based on the test results, required changes will be carried out and tested. Post this, Canara HSBC Insurance Company Website will be officially launched and operational acceptance will be complete.
- In order to accept the system, Canara HSBC Insurance Company must be satisfied that all of the work has been completed and delivered to Canara HSBC Insurance Company complete satisfaction and that all aspects of the system perform acceptably. The functional/logical acceptance of the system will only be certified when the proposed system is installed and configured according to the design and that all the detailed procedures of operating them have been carried out by the Bidder in the presence of Canara HSBC Insurance Company staff.

1.8 Website Maintenance

- Quarterly Periodical review and modifications of website layout, homepage, internal pages, images, effects, videos, icons, customer journey, content, response, and other features will be carried out at the end of every quarter. Also, all the updation / up-gradation should be carried out at midnight (or when the traffic on website is lowest) to avoid any inconvenience. Any changes, modifications, updation, up-gradation will be carried out accordingly by the bidder.
- Monthly review will be done by Canara HSBC Insurance Company, but not limited to, for uptime percentage of website, SEO rankings, website performance, technical difficulties, CMS performance, security etc..
- Selected bidder is required to prepare a schedule for maintenance activity and carry them out regularly. Maintenance activity to be carried out at midnight to avoid visitor inconvenience.
- Bidder will have to appoint a dedicated team at their premises for maintenance of website throughout the contract period. The team should include at least one designer, one developer and one project manager who will be the single point of contact for Canara HSBC Insurance Company throughout the contract period. Any change in the team should be informed to the bank at least 1 month in advance.
- Some dynamic pages may require more frequent editing/ modifications/ updation etc.. Such pages should be identified accordingly and a monthly review will be done for them at the end of every month throughout the contract period. Any changes, modifications, updation, up-gradation will be carried out accordingly by the bidder.
- The discrepancies found during audit should be complied with in 10 days.
- Tender notices, publishing Canara HSBC Insurance Company results, announcements and any last minute updation should be taken on highest priority and done within 30 minutes after informed.
- Bidder should provide Dash board, customized MIS reports i.e. drill down report, Matrix report, SLA's regarding health and maintenance of the site, industry standards including following information at no extra cost but not limited to:
 - Availability of the Website—Geographical Region Wise.
 - Response time of the website.

- Bidder shall take steps to prevent unauthorized access to data and contain malicious activities directed at the Canara HSBC Insurance Company website/dedicated server hosting of Canara HSBC Insurance Company website through Internet or otherwise.
- Whenever any new threats/vulnerabilities become public, the bidder will take appropriate steps to protect the interests of the Canara HSBC Insurance Company so far as it relates to the services covered under this agreement and shall also bring this to the notice of Canara HSBC Insurance Company immediately and, wherever required, help/guide Canara HSBC Insurance Company in plugging the same.
- Once the call is received by the bidder, it will put its maximum efforts and deploy its best resources to resolve all calls at the earliest possible time frame.
- The bidder shall be responsible for any act of its employees that may result in security breach of Canara HSBC Insurance Company Website.
- Selected Bidder has to provide technical support under the current scope of AMC for new module developed by them during the entire life cycle of contract. If new module developed by some other agency, technical support has to be provided by bidder on mutually agreed payment terms.
- Resolution of errors/bugs (if any), software updates, changes in the software that may be necessary due to legal/statutory changes etc.
- Providing all software updates and patches released by the OEM (Original Equipment Manufacturer), update and patch management, resolution of any issues/problems with the software etc.
- Deploy adequate facilities management personnel to maintain the Website as per the service level requirements
- Periodically update and insert static pages/contents as per Canara HSBC Insurance Company.
- Successful bidder shall provide a dedicated project manager during the period of the contract that should be present for discussions, important meetings and should act as one point contact for Canara HSBC Insurance Company.
- An onsite resource for the maintenance of the website
- Maintaining the Feedback/Grievances page of the website
- No extra cost shall be remunerated by Canara HSBC Insurance Company on account of such maintenance activities mentioned herein above.

1.9 Technical

- a. Should work on current stack – AIX, IBM Websphere Portal v6.1, IBM DB2 UDB v9.x
- b. Must have complete forward compatibility with IBM Websphere Portal v8.1. No rework should be required.
- c. Website download (loading) and processing performance speed should be less than 4s on LAN.
- d. Application must follow OWASP security standards.
- e. Should have the capability to restart from the point of failure
- f. Audit Process to capture the job processing details
- g. Unit Testing & System Integration Testing
- h. Validated against Benchmarks for Performance and load test
- i. Code Configuration Management
- j. Robust DR Capability
- k. Knowledge transfer and handover to the existing production support team

- l. Relevant trainings
- m. Sizing of production environment
- n. Complete handover and knowledge transfer to the BAU maintenance team of the website, as identified by the company.

The lists of existing modules are available in [Annexure D](#) . Same can also be identified in company's website.

Deliverables

- a. At least 3 design option for homepage and internal page to choose and finalize
- b. HTML Prototype of the entire website
- c. Project Plan
- d. Application Design Specification & related documents
- e. Solution Architecture Design Document with Technical Specification
- f. Database Design (Database architect document, Data Dictionary & Table Design)
- g. Standards, Usability and UI Design Specifications
- h. Testing Strategy (Test Plan)
- i. System Test Cases and Test Results,
- j. Deployment Documentation
- k. Unit & System Tested Code
- l. Final Documentation (This will be updates to the documents prepared during the course of the project)
- m. Quality Standards and QA reports
- n. Risk & Issue Logs
- o. Source Code Version Document
- p. Release History and Delivery Notes
- q. Knowledge Transfer and handover document
- r. Other project related documents

Expected timeline for resource on board

The Company expects resource to be on board in 2 weeks from the date of issue of letter of intent.

In Scope Modules

- But not limited to below list.

Home Page	
About Us	
	Who We Are
	Why choose Us?
	Our Guiding Principle
	Our Team
	Our Promoters

	Achievements
	Awards & Recognition
	Corporate Social Responsibility
Testimonials	
Blog	
Customer Information	
	Policy Servicing
	Claims Process
	Grievance Redressal
	Pre-Policy Insurance Process
Privacy Policy	
Disclaimer	
Do Not Call Registry	
Sitemap	
Insurance Terms and Fact	
FAQs	
	Information Safety
	Complaint Investigation
	Suspicious Calls
	Premium Conversion
	Choose renewal payment date
Download Centre	
Terms of Use	
Hyperlink Policy	
Ombudsman Procedure	
Public Disclosures	
Corporate Agents	
Whistle Blower Policy	
Report an Incident	
Tenders & Notices	
NRI Customers	
Follow us at Social Media	
Share on Social Media	
Premium Payment	
Payment Gateway Integration	
Print Receipt	
Claim Assist	
Product Listing and details	
Life Stage wise Plan showcase	
Insurance Calculators	
Various Online Forms	

Banners on Home page	
Banners on Inside page	
Advertising Section	
Call Back Form	
Buy Online	
	Online Term Plan
	Online ULIP Plan
All Plans	
	Online Plans
	Traditional Plans
	ULIP Plans
	Group Plans
Tools and Calculators	
	Calculate Fund Value
	Calculate Premium
	How much life insurance do I need?
Funds & Nav	
	Funds Performance
	Manage Funds
	NAV
	Latest NAV
	NAV History
	Monthly Funds Disclosure
	Investment Newsletter
	Policy Account Value
	Benchmark Yield (History)
	Investment Team Profile
Manage Policies	
	Pay Premium
	Policy Details On SMS
	Service Requests On Call
	Update Your Contact Details
	Print Premium Receipt
	Track Application
	Generate Policy Pack
	Turn Around Time
	Update Your Aadhaar Number
	Update Your PAN Number
Claims	
	Claims Process
	Get Claim Assistance
	Unclaimed Amount
	Claim Forms

	Claim Status
Get a Free Quote	
Call Me Back	
Media Centre	
	News & Press Releases
	Request Information
	Media Contact
	Company Factsheet
Knowledge Centre	
	Customer Education
	Insurance Guide
	Customer Awareness
	Glossary
	Life Insurance-A Consumer's Perspective
	Electronic Insurance Account
	Goods and Services Tax (GST)
NRI Corner	
	Information
Careers	
	HR Contact
	Current Vacancies
Contact Us	
	Get a call back
	Contact Details
	Have A Question, Let Us Help You
	Grievance Redressal
	Locate a Branch
	Feedback
Register	
Login	
Connect to Customer Portal	
Image Gallery	
Video Gallery	
Download Reports	
Complaint	
	Register your complaint
	Track Your Complaint

Annexure – II (Technical Bid)

EVALUATION INPUTS

Company Credentials			
		Documents/Supporting Required	Bidders Input
1	Total employee strength of the organization	Self attested document	
2	Revenue in past 3 years (2017-18, 2016-2017, 2015-2016)	Audited Financial Statements	
3	No. of Offices PAN India	Self attested document	
4	Office at Delhi NCR, its team strength and capacity of deliveries	Self attested document	
5	Governance process - Overall as an organization, projects & deliveries	SOP Document	
6	Top 5 past deliveries (in last 2 financial years)	Case Studies	
7	Specific organization or project reference	References with contact details	
8	Top 5 past CMS project deliveries (in last 2 financial years)	Case Studies	
Project Support			
9	Team size proposed, peak usage	Team structure	
10	Project Manager & Leads - Number of representation & quality	Profiles of resources	
11	Team structure proposed	Team structure	
12	Periodic review mechanisms	SOP Document	
13	No. of resources for the project with Usability experience with more than 5 years. Preferably CUA (Certified Usability Analyst) from any good institute	Profiles of resources	
14	No. of resources for the project with web/UI design experience with more than 5 years. Should have expertise in Adobe Photoshop and Adobe Flash	Profiles of resources	
15	Agency implant for maintenance and	Profiles of resources	

	content update - Feasibility, number and quality		
Project Schedule			
16	Ramp-up time for resources to come on-board	Project Schedule Chart	
17	Implementation schedule and project duration (in Weeks)		
18	Handover to production support		
19	Maintenance scope and duration (in the approach)		
Testing			
21	Performance Testing	Testing Plan	
22	Regression Testing		
23	Security Testing		
24	Browser Compatibility Testing		
25	Content update		
26	Integration with internal systems		
27	Downtime factors and uptime TATs		
Website Design, Content Approach, UX, UI and Overall Strategy			
28	Audit of existing website, traffic	Audit report	
29	Approach and strategy for achieving business needs	Approach and Plan with details of the proposed solution	
30	Proposed solution - Design		
31	Proposed solution - Content		
32	Proposed solution - UX & UI		
33	Proposed solution - Integration with Buy journey		
34	Proposed solution - Proposed tools & calculators		
35	Proposed solution - SEO recommendations		
36	Proposed solution - Scope for up scaling the website		
Technical Approach			
37	Technical Approach - Structure	Approach and Plan	

38	Technical Approach - Platforms and coding approach		
39	No. of years of experience in proposed solution		
40	Average size of website project (in terms of FTE)		
41	Structure proposed for SEO recommendations		
42	Experience with Analytical tools		
Content Management System			
43	Proposed CMS solution - Available designs and flexibility to create pages	Approach and Plan with details of the proposed CMS solution	
44	Proposed CMS solution - Content update mechanism		
45	Proposed CMS solution - Customization scope		
46	Proposed CMS solution - Operational and Maintenance requirements		
47	Proposed CMS solution - Usability and user interaction		
48	Proposed CMS solution - Maintenance and operational support required		
49	Proposed CMS solution - Integration with internal systems and no of user licenses		
50	Proposed CMS solution - SEO integration		
51	Proposed blogging platform - Design & ease in content update		
52	Proposed blogging platform - Integration capabilities		
53	Integration to Analytics & other third party applications		
Hosting Support			
54	Proposed architecture (with feasibility report post website audit)	Audit Report	
55	Migration plan	Detailed Plan	
56	Maintenance and support for proposed solution		
57	Risk mitigation plan		
58	No. of years of experience in		

	managing websites hosted on Cloud		
Final Presentation (Face to Face Presentation)			
59	Presentation - Detailing out the proposed solution for the organization	Detailed Presentation	
60	Case Studies		

Security

Sr. No.	Particulars	Bidder Responses	Remarks
1	Business Continuity strategy along with RTO & RPO values (PR & DR site location) with respect to website		Yes/No with details (location of PR and DR site & RTO, RPO values for website)
2	VA/PT testing to be conducted for portal and applications prior to go-live and at least annually or as and when significant changes occur. All high and medium vulnerabilities to be closed prior to go-live and within 1 month otherwise		Yes/No along with the scope (e.g. OWASP top 10/20 etc.) and level of testing (White box, Grey box, Black box). Also, please share the last network security test report
3	Service provider to share details of Shared/dedicated hardware, database or application		Details with application architecture diagram
4	Service provider shall have IPS and firewall placed to protect the server from external threats		Yes/No with network diagram
5	Service provider shall have SSL security certification in place		Yes/ No with details of SSL certificate
6	Service provider shall have a defined process towards periodic review of firewall rule set		Yes/No with periodicity
7	Service provider shall have a defined process towards periodic VA to be conducted for OS, DB, application and portal		Yes/No with periodicity
8	Service provider shall have a defined process towards periodic patching to be conducted of OS, DB, application and portal		Yes/No with periodicity
9	Service provider shall have a defined process towards regular updation of		Yes/ No with periodicity

	Antivirus signatures		
10	Service provider shall share Network Diagram and Portal architecture for Production and DR site		Network diagram and Portal architecture
11	Service provider shall mandate two factor authentication for access to Admin account		Yes/ No
12	Password policy should be enforced on the portal (Admin account), application (User account) and servers. If yes, share the following details of the policy: <ul style="list-style-type: none"> - Password history - Maximum age - Length of the password - Invalid login attempts permitted - Account lockout duration - Password reset mechanism 		Yes/No with details and snapshot
13	Will there be any session timeout defined on the portal (Admin account) and application (User account)? If yes what is the time duration?		Yes/No with details and snapshot
14	Service Provider shall have in place secure coding guidelines for programming languages used		Yes/ No with Secure coding guidelines for programming languages used
15	Incident management process in place and all incidents raised should be communicated to the company within 2 hours of the incident occurring time.		Yes/ No
16	Service provider shall ensure that database encryption is in place		Yes/ No with details
17	The service provider shall ensure that it has implemented requisite controls on its web-portal & applications against DDOS attack vectors		Yes/ No with details of DDOS controls implemented
18	What is the network uptime guaranteed?		Uptime percentage
19	Service provider shall lock HTML source code to protect web pages from unauthorized copy		Yes/ No
20	The Company reserves the right		Yes/ No

	to conduct planned as well as surprise audits to check the compliance to Information Security related requirements prescribed as a part of the Agreement.		
21	Use of CAPTCHA should be feasible and the same should be deployed as required by the Company		Yes/ No
22	Service provider shall ensure that passwords should not be hardcoded in any website configuration files or stored in plain text. Password shall be encrypted to reduce the effectiveness of password cracking.		Yes/ No with details of controls implemented
23	Service provider shall ensure that the website is IPv6 compliant.		Yes/ No
24	Service provider shall have a defined process towards monitoring of website (Uptime, malware scanning, DNS poisoning, etc.)		Yes/ No with details of monitoring
Content Management System			
25	Service provider shall provide a formal support including periodic release of patches		Name of CMS solution and support/ patches details
26	Service provider shall have a defined change management process for all changes made		Yes/ No with change management process document
27	Service provider shall conduct security testing for all plugins and web services planned/ exposed		Yes/ No
28	Service provider shall provide details of integration planned with the Company		Network architecture diagram and proposed operating model

Annexure – III (Commercial Bid)

Company Name :
Contact Person :
Email ID :
Contact No :

S. No	Description	Details
1	Development Cost in INR	
2	Annual maintenance cost (maintenance period for 2 years to be renewed annually)	
3	Any other Cost	

- Taxes will be extra
Please mention the percentage

ANNEXURE-IV

Please submit vendor registration document as per attached XLS file

Bidders are requested to share the draft of agreement along with RFP response

ANNEXURE-V

(To be printed on stamp paper)

NON DISCLOSURE AGREEMENT

THIS Non Disclosure Agreement (this "**Agreement**") is made on day of 201_ ("Effective Date"), by and between:

Canara HSBC Oriental Bank of Commerce Life Insurance Company Limited, a company incorporated under the Companies Act, 1956 having its registered office at Unit No. 208, 2nd Floor, Kanchenjunga Building, 18 Barakhamba Road, New Delhi - 110001, India and corporate office at 2nd Floor, Orchid Business Park, Sector-48, Sohna Road, Gurgaon 122018, Haryana (hereinafter referred to as the '**Company**') which expression shall, unless it be repugnant to the context or meaning thereof, be deemed to mean and include their respective subsidiaries, affiliates, successors and permitted assigns and affiliates) of the ONE PART, AND

_____ a company incorporated under the Companies Act, 1956 having its registered office at

_____ (hereinafter referred to as the '**Service Provider**') which expression shall, unless it be repugnant to the context or meaning thereof, be deemed to mean and include their respective subsidiaries, affiliates, successors and permitted assigns and affiliates) of the OTHER PART

(The Company and the Service Provider (jointly and severally) hereinafter are referred to as '**Parties**' collectively and '**Party**' individually).

WHEREAS

(i) The Parties are, or will be, evaluating, discussing and negotiating a potential contractual relationship concerning the _____ (the '**Project**').

(ii) The Parties may, in these evaluations, discussions and negotiations, disclose to each other information that is technically and /or commercially confidential.

"Confidential Information" means (a) any information disclosed by either Party to the other Party, either directly or indirectly, in writing, orally, electronically, other media format, and/or in tangible objects, including, without limitation, algorithms, mask works, business plans, customer data, customer lists, customer names, financial analysis, forecasts, formulas, hardware configuration information, know-how, ideas, designs, discoveries, market information, marketing plans, processes, products, product plans, research, specifications, software, source code, trade secrets or any other information whether designated as "confidential," "proprietary" or not or any third Party information that the disclosing Party has an obligation of confidentiality to protect (collectively, the "Disclosed Materials") and (b) any information otherwise obtained, directly or indirectly, by a receiving Party through inspection, review or analysis of the Disclosed Materials. Information disclosed orally shall be considered Confidential Information only if such information is stated as such at the time of disclosure and is confirmed in writing as being Confidential Information within thirty (30) days after the initial disclosure.

Exceptions: Confidential Information shall not, however, include any information that (i) is available in the public domain; or (ii) is independently developed by the receiving Party without use of or reference to the disclosing Party's Confidential Information, as shown by documents and other competent evidence in the receiving Party's possession; or (iii) is required to be disclosed by the receiving Party by order of a court, administrative agency or governmental body, or by any law, rule, regulation, subpoena, or any other administrative or legal process.

Non-use and Non-disclosure: Each Party agrees not to use, directly or indirectly, in whole or in part, any Confidential Information of the other Party other than for the purposes of the Project and as specifically provided for in this Agreement. Receiving Party may disclose the other Party's Confidential Information to employees of the receiving Party on a need to know basis. If a receiving Party is required by law to make any disclosure that is prohibited or otherwise constrained by this Agreement, the receiving Party will provide the disclosing Party with prompt written notice of such requirement so that the disclosing Party may seek a protective order or other appropriate relief. Subject to the foregoing sentence, such receiving Party may furnish that portion (and only that portion) of the Confidential Information that the receiving Party is legally compelled or is otherwise legally required to disclose; provided, that the receiving Party provides such assistance as the disclosing Party may reasonably request in obtaining such order or other relief.

Maintenance of Confidentiality: Each Party agrees that it shall take reasonable measures to protect the secrecy of and avoid disclosure and unauthorized use of the Confidential Information of the other Party. Each Party shall ensure that its employees who have access to the other Party's Confidential Information are legally obligated not to disclose such Confidential Information, prior to any disclosure of Confidential Information to such employees. No Party shall make any copies of the other Party's Confidential Information except upon the other Party's prior written approval. A Party receiving Confidential Information shall promptly notify the Party disclosing such Confidential Information of any use or disclosure of such Confidential Information in violation of this Agreement of which the receiving Party becomes aware. The Parties shall at all times have systems in place having adequate security measures required for the protection of the Confidential Information from leakage or unauthorized usage.

Return of Materials: All documents, data and other tangible objects (in whatever media or format) containing or representing Confidential Information that have been disclosed by either Party to the other Party, and all copies or extracts thereof that are in the possession of the other Party, shall be and remain the property of the disclosing Party and shall be promptly returned to the disclosing Party upon the disclosing Party's written request and on expiry or termination of this Agreement.

No License, Testing or Publicity: Nothing in this Agreement is intended to grant any rights to either Party under any discovery, disclosed invention, patent, mask work right, copyright, trade secret, trademark or service mark, or other intellectual property right of the other Party, nor shall this Agreement grant any Party any rights in or to the other Party's Confidential Information. Nothing herein grants any rights whatsoever to the Parties to test, disassemble, decompile, reverse engineer, replicate, or otherwise copy any of the Confidential Information or a Party's intellectual property. No Party shall use or cause to be published in any kind of media or communication the name, logo or other identifying information of any of the Parties to this Agreement without the prior expressed written consent of the specific Party.

Term: The Agreement shall be valid until its expiry or termination as per the below terms:

The obligations of each receiving Party under this Agreement shall survive until such time as all Confidential Information of the other Party disclosed hereunder becomes publicly known and made generally available through no action or inaction of the receiving Party.

The Parties shall return all Confidential Information to the disclosing Party on or before the termination of this

Agreement.

- c) The Company may terminate this Agreement by giving 30 (Thirty) days of notice in writing to the Service Provider. Nothing in this Agreement shall obligate either Party to proceed with any transaction between them.

Availability of Equitable Relief: Each Party understands and agrees that its breach or threatened breach of this Agreement will cause irreparable injury to the other Party and that money damages will not provide an adequate remedy for such breach or threatened breach, and both Parties hereby agree that, in the event of such a breach or threatened breach, the non-breaching Party will also be entitled, without the requirement of posting a bond or other security, to equitable relief, including injunctive relief and specific performance. The Parties' rights under this Agreement are cumulative, and a Party's exercise of one right shall not waive the Party's right to assert any other legal remedy. Should any proceeding or litigation be commenced between the Parties hereto concerning the terms of this Agreement, or the rights and duties of the Parties hereto, the prevailing Party in such proceeding or litigation shall be entitled, in addition to such other relief as may be granted, to a reasonable sum as and for the prevailing Party's attorneys' fees.

Governing Law and Jurisdiction: This Agreement shall be subject to the laws of India and the Parties agree to the exclusive venue and jurisdiction of the courts situated in New Delhi.

10. **Counterparts and Facsimiles:** The Parties may execute this Agreement in counterparts, each of which is deemed an original, but all of which together constitute one and the same Agreement.
11. **Expenses:** Each of the Parties shall be responsible for its own expenses. Receiving Party shall be completely responsible for its cost and expenses in conducting any evaluations, and reporting the results of an evaluation, unless other specific arrangements are made in writing prior to the expenses being incurred.
12. **Notice:** All notices required or permitted to be given under this Agreement to either Party shall be in writing and delivered to the address set out in the first paragraph of this Agreement or as changed by the Parties by written notice delivered to each other from time to time in accordance with this Agreement. Notice shall be deemed given upon actual receipt.
13. **Miscellaneous:** Nothing in this Agreement shall be construed as creating an agency, partnership, joint venture, or other business relationship or association between the Parties. No provision of this Agreement may be waived except by a writing executed by the Party against whom the waiver is to be effective. A Party's failure to enforce any provision of this Agreement shall neither be construed as a waiver of the provision nor prevent the Party from enforcing any other provision of this Agreement. No provision of this Agreement may be amended or otherwise modified except by a writing signed by the Parties to this Agreement. If any provision of this Agreement is found to be illegal or unenforceable, the other provisions shall remain effective and enforceable to the greatest extent permitted by law.

IN WITNESS WHEREOF, this Agreement was duly executed on behalf of the Parties on the day and year first above written.

By: _____

Name: _____

Title: _____

Witness:

By: _____

Name: _____

Title: _____

Witness: