INVITATION FOR REQUEST FOR PROPOSAL FOR DEVELOPMENT OF NEXTGEN MARKETING TECHNOLOGY PLATFORM FOR LIFE INSURANCE CORPORATION OF INDIA

(Ref: LIC/CO/IT/DT/2024/RFP/03 Dated: 18.07.2024)

Corrigendum

S.No	Addition / Deletion / Modification / Clarification	RFP Clause No. / Annexure No. & Page No.	Old Requirement / Condition / Annexure	New Requirement / Condition / Annexure
1	Modification	5.2 Stage 1 – Bidder Eligibility Criteria, Page 99	**Note:** In case any Bidder has undergone corporate restructuring (including merger, demerger, hive off, slump sale etc.) in the last three financial years (FY 2020-21, 2020-22, 2022-23), it should showcase credentials of its erstwhile/current entity provided sufficient documentary proof is submitted with the undertaking to evince that such credentials have been transferred to the bidding entity and the bidding entity is authorized to use such credentials. Notwithstanding the foregoing, credentials of the parent entity, holding entity, subsidiaries or affiliates etc. cannot be used (and shall not be considered) unless such parent entity, holding entity, subsidiaries, or affiliates etc. is itself bidding in this RFP.	**Note:** In case any Bidder has undergone corporate restructuring (including merger, demerger, hive off, slump sale etc.) in the last three financial years (FY 2020-21, 2020-22, 2022-23), it should showcase credentials of its erstwhile/current entity provided sufficient documentary proof is submitted with the undertaking to evince that such credentials have been transferred to the bidding entity and the bidding entity is authorized to use such credentials. In case of Global Client References, the bidder can submit work done by its subsidiaries/sister concerns/ group companies/ companies in same brand name.
2	Modification	5.2 Stage 1 – Bidder Eligibility Criteria, Page 98	**Client Reference for OEM** Solutions from OEM(s) for Campaign Management/ Customer Engagement/Marketing Automation capabilities (as outlined in the RFP), should have been implemented for 3 clients each with minimum of 5 crore user base.	**Client Reference for OEM** Solutions from OEM(s) for Campaign Management/ Customer Engagement/Marketing Automation capabilities (as outlined in the RFP), should have been implemented for 3 clients each with minimum of 5 crore active user base.
3	Modification	Form T-1C: Bidder's Eligibility Criteria as per the RFP, Page 128	**Client Reference for OEM** Solutions from OEM(s) for Campaign Management/ Customer Engagement/Marketing Automation capabilities (as outlined in the RFP), should have been implemented for 3 clients each with minimum of 5 crore user base.	**Client Reference for OEM** Solutions from OEM(s) for Campaign Management/ Customer Engagement/Marketing Automation capabilities (as outlined in the RFP), should have been implemented for 3 clients each with minimum of 5 crore active user base.
4	Modification	5.3 Stage 2 – Technical		Please refer to *5.3 Stage 2 – Technical Bid*

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		Bid Evaluation, Page 100		*Evaluation (Revised)* for updated technical evaluation criteria.
5	Modification	5.3.1 Bidder's experience in relevant projects with the proposed OEM tools, Page 102		Please refer to *5.3.1 Bidder's experience in relevant projects with the proposed OEM tools (Revised)* for updated scoring for case studies.
6	Modification	5.2 Stage 1 – Bidder Eligibility Criteria, Page 98	**Program Director Experience** The Program Director must have experience in the execution and implementation of a complex MarTech enablement project. The experience must include at least the following features/tools/services: 1. Campaign Management/Customer Engagement/ Marketing Automation. The project overseen by the Program Director must have had a minimum user base of 1 crore for an Indian organization.	**Program Director Experience** The Program Director must have experience in the execution and implementation of MarTech enablement projects (India or abroad). The experience must include at least the following features/tools/services: 1. Campaign Management/Customer Engagement/ Marketing Automation. One of the projects overseen by the Program Director must have had a minimum active user base of 1 crore.
7	Modification	Form T-1C: Bidder's Eligibility Criteria as per the RFP, Page 129	**Program Director Experience** The Program Director must have experience in the execution and implementation of a complex MarTech enablement project. The experience must include at least the following features/tools/services: 1. Campaign Management/Customer Engagement/ Marketing Automation. The project overseen by the Program Director must have had a minimum user base of 1 crore and must have been executed for an Indian BFSI, Telecom, or Retail organization.	**Program Director Experience** The Program Director must have experience in the execution and implementation of MarTech enablement projects (India or abroad). The experience must include at least the following features/tools/services: 1. Campaign Management/Customer Engagement/ Marketing Automation. One of the projects overseen by the Program Director must have had a minimum active user base of 1 crore.

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8	Modification	3.2.1. Campaign Management – Functional Requirements, Page 202		References to "Direct Mail" in points 8, 11, 16, 35, 53, 59 are deleted.
9	Modification	3.2.2. Audience Management – Functional Requirements, Page 213		References to "Direct Mail" in point 34 are deleted.
10	Modification	3.2.1. Campaign Management – Functional Requirements, Point 17, Page 203	Set specific SLAs for each campaign, calculating the timings of fulfillment, e.g., defining when the mail starts to be released or broadcast by the fulfillment house.	Set specific SLAs for each campaign, calculating the timings of fulfillment, e.g., defining when an SMS is sent by the system and when the same is delivered to the recipient.
11	Modification	3.2.2. Audience Management – Functional Requirements, Page 213		References to "CDP" in points 5, 48, 50 replaced with "Audience Management".
12	Modification	3.2.5. Non-functional Requirements, Page 226		References to "CDP" in points 33, 97 replaced with "Audience Management".
13	Addition	5.3.6 Quality of Team, Page 110		If the any of the case study(s) submitted by the bidder are not with the proposed OEM(s), the bidder needs to – i. Ensure that minimum of 3 members of the working team for the project are certified by the OEM(s) ii. Share CVs of key expert(s) from the respective OEM(s). LIC reserves the right to review the CV and select the preferred expert(s). 	Role	Deliverable	Availability

S.No	Addition / Deletion / Modification / Clarification	RFP Clause No. / Annexure No. & Page No.	Old Requirement / Condition / Annexure	New Requirement / Condition / Annexure	
				Solution Architect (with functional expertise)	1. Campaign Mgmt. – • Interim Solution: Go-live • Target State: UAT Sign-off 2. Audience Mgmt. – • Target State: UAT Sign-off 3. AB/MVT Mgmt. – • Target State: UAT Sign-off	100%
14	Modification	3.2.5. Non-functional Requirements, Point 58, Page 231	Centrally set up or block users outside of the AB Testing Tech platform using different tools and assign them to specific AB Testing Tech platform modules.	Centrally set up or block users outside of the MarTech components and assign them to specific modules within the same.	
15	Modification	3.2.5. Non-functional Requirements, Point 90, Page 234	Operate the proposed solution on a sufficient number of IPs, at least 1000, to prevent blacklisting and guarantee inbox delivery, ensuring that services are accessible from any location with internet connectivity.	Operate the proposed solution on a sufficient number of IPs, to prevent blacklisting and guarantee inbox delivery, ensuring that services are accessible from any location with internet connectivity.	
16	Modification	5.3. Availability, Page 239	The SaaS products should be highly available and should adhere to 99.99% uptime.	The SaaS products should be highly available and should adhere to 99.5% uptime.	
17	Deletion	3.2.5. Non-functional Requirements, Point 50, Page 231	Ensure a solution availability of at least 99.99%, excluding agreed downtime, and design the solution with a resilient architecture that has no single point of failure.	*This point is deleted.*	
18	Modification	3.2.5. Non-functional Requirements, Point 51, Page 231	Ensure a solution availability for systems of at least 99.99%, excluding agreed downtime, and design the solution with a resilient architecture that has no single point of failure.	Ensure a solution availability for systems of at least 99.5%, excluding agreed downtime, and design the solution with a resilient architecture that has no single point of failure.	
19	Modification	3.2.6. Tokenization and	Requirement **not marked** as Mission Critical	Requirement **marked** as Mission Critical (MC)	

S.No	Addition / Deletion / Modification / Clarification	RFP Clause No. / Annexure No. & Page No.	Old Requirement / Condition / Annexure	New Requirement / Condition / Annexure
		Data Vault – Functional & Non-functional Requirements, Point 8, Page 237	(MC) Redundant systems and failover mechanisms to ensure continuous operation and availability, even in the event of hardware failure.	Redundant systems and failover mechanisms to ensure continuous operation and availability, even in the event of hardware failure **(99.5%)**
20	Modification	5.3.1 BCP, Page 240		Please refer to **5.5 BCP (Revised)** for updated list of metrics that bidder must adhere to.
21	Modification	6. Other Terms and Penalties, Penalties for SLA uptime, Page 262		Please refer to **Penalties for SLA uptime (Revised)**
22	Modification	6.1.4. Availability, Page 265		Please refer to **6.1.4. Availability (Revised)**
23	Modification	1.2 Bidder Role Expectations, Page 185	1. The bidder is responsible for end-to-end setup/build and delivery of specific parts of Marketing Platform/System of marketing platform for marketing & sales across Life Insurance value chain from Distribution, Sales and Marketing, Onboarding and Underwriting, Servicing and Operations, Claims Management etc. to all existing and prospective customers, employees, field force and partner agencies, etc. It will also be available for consumption with existing or new applications from LIC or third party authorized agencies/partners/banks. The bidder shall implement and deliver the solution for multiple digital interaction channels like Email, Mobile App, Web, WhatsApp, SMS, Social Chat, Chatbot,	1. The bidder is responsible for end-to-end setup/build and delivery of specific parts of Marketing Platform/System of marketing platform for marketing & sales across Life Insurance value chain from Distribution, Sales and Marketing, Onboarding and Underwriting, Servicing and Operations, Claims Management etc. to all existing and prospective customers, employees, field force and partner agencies, etc. It will also be available for consumption with existing or new applications from LIC or third party authorized agencies/partners/banks. The bidder shall implement and deliver the solution for multiple digital interaction channels like Email, Mobile App, Web, WhatsApp, SMS, Chatbot, etc.

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			etc.	
24	Modification	5.3.2 Overall features and coverage of the proposed solution & OEM Tools, Page 104	1. Scoring: Bidders will self-evaluate themselves across individual parameters in the excel sheet provided (Titled "MartechPlatform-OEM_Checklist") as part of the bid response; every requirement marked as "Out-of-the-box/configurable" will be given 1 point	1. Scoring: Bidders will self-evaluate themselves across individual parameters in the excel sheet provided (Titled "***MartechPlatform-OEM_Checklist - Revised")*** as part of the bid response; every requirement marked as "Out-of-the-box/configurable" will be given 1 point

Appendix

5.3 Stage 2 – Technical Bid Evaluation (Revised)

Table 2: Technical Evaluation Criteria

#	Evaluation Criteria	Total Marks
1	Bidder's Experience – The bidder should share a production live **case study** showing in detail relevant project with the proposed tech components **utilizing Campaign Management**. Marks will be awarded basis the relevance of the scope of work to this RFP and the specificity of the case study on the topics mentioned below. 1. Scope of work performed (as defined in the RFP) - **2 marks** 2. Robustness & scalability of solution architecture design – **1 mark** 3. No. of active users – **3 marks** The case study will carry a maximum of 6 marks. The case study should not exceed 10,000 words. In case, the bidder does not have a case study with the proposed OEM, the bidder can submit a case study for **Campaign Management with similar scope of work as defined in the RFP** with any other OEM. However, the maximum marks will then be 75% of the total, (divided in the same proportion as above).	**6**
2	Bidder's Experience – The bidder should share a production live case study **case study** showing in detail relevant project with the proposed tech components **utilizing Audience Management**. Marks will be awarded basis the relevance of the scope of work to this RFP and the specificity of the case study on the topics mentioned below. 1. Scope of work performed (as defined in the RFP) - **0.5 marks** 2. Robustness & scalability of solution architecture design – **0.5 marks** 3. No. of active users – **2 marks** The case study will carry a maximum of 3 marks. The case study should not exceed 10,000 words. In case, the bidder does not have a case study with the proposed OEM, the bidder can submit a case study for **Audience Management with similar scope of work as defined in the RFP** with any other OEM. However, the maximum marks will then be 75% of the total, (divided in the same proportion as above).	**3**
3	Bidder's Experience – The bidder should share a production live case study **case study** showing in detail relevant project with the proposed **tech components utilizing AB/MVT.** Marks will be awarded basis the relevance of the scope of work to this RFP and the specificity of the case study on the topics mentioned below.	**3**

#	Evaluation Criteria	Total Marks
	1. Scope of work performed (as defined in the RFP) - **0.5 marks** 2. Robustness & scalability of solution architecture design – **0.5 marks** 3. No. of active users – **2 marks** The case study will carry a maximum of 3 marks. The case study should not exceed 10,000 words. In case, the bidder does not have a case study with the proposed OEM, the bidder can submit a case study for **AB/MVT with similar scope of work as defined in the RFP** with any other OEM. However, the maximum marks will then be 75% of the total, (divided in the same proportion as above).	
4	Bidder will be evaluated based on coverage of features by OEM Tools 1. Campaign Management System: Functional requirements - **7 marks** 2. Audience Management System: Functional requirements - **4 marks** 3. AB/MVT Tool: Functional requirements - **4 marks** 4. Non-functional requirements (across Campaign Management, Audience Management & AB/MVT tools) - **6 marks**	**21**
5	**OEM Capability –** 1. Experience with other clients - Implementation of campaign management/customer engagement/marketing automation for other clients in last 3 years, since Jan-21 **- 10 marks** 2. Experience with implementing campaign management/customer engagement/marketing automation for a large active user base **- 8 marks**	**18**
6	Robustness of the proposed solution architecture & project planning 1. Overall solution design, set-up & Integration/interoperability across other tech solutions **- 4 marks** 2. Project planning, milestones and delivery management plan and backlog management and development methodology **- 10 marks**	**14**
7	Bidder will be evaluated based on their proposed Managed Services and Maintenance plan for the marketing automation platform. 1. Planning and refinement of overall marketing activities/campaigns strategy **- 2 marks** 2. Setup and deployment (incl. configuration, customization, and integrations) of campaigns/activities within respective tech platforms **- 2 marks** 3. Monitoring, reporting, and optimization of marketing activities/campaigns **- 1 mark**	**5**
8	Quality of team – 1. Project Director: **10 marks** 2. Creative Lead: **5 marks** 3. Campaign Management Platform specialist: **5 marks**	**20**

#	Evaluation Criteria	Total Marks
9	References **(2*5 = 10 marks)**	**10**
	TOTAL	**100**

**All client references/case studies should be for Cloud-based SaaS solution.

5.3.1 Bidder's experience in relevant projects with the proposed OEM tools (Revised)

The bidder shall provide a case study providing details of a project with proposed tech components of Campaign Management (including Marketing Automation/Customer Engagement) that will be verified by LIC (Max Marks – 6).

In case, the bidder does not have a case study with the proposed OEM, the bidder can submit a case study for Campaign Management with similar scope of work as defined in the RFP with any other OEM. However, the maximum marks will then be 75% of the total.

#	Dimension	Criteria	Indicative Criteria	Max marks	Scoring guidelines	Marks per Criteria
1	**Bidder's Experience**	Case study scope	The case study should cover all the scope elements for Campaign Management System as described in RFP	2	None or very few of the specific scope elements are addressed OR the scope mentioned is not clear.	0
					Most scope elements are addressed. But not all are detailed out completely.	1
					All scope elements are addressed; descriptions and deliverables are specific and detailed.	2
		Solution architecture design	The case study should cover all the architectural elements of Campaign Management System as described in RFP	1	No or incomplete Solution design/architecture	0
					Many of the architectural elements are addressed in the case study. A few non-critical components are missing and/or the description is unclear in some places	0.5
					All architectural elements are addressed; descriptions are specific and detailed	1
		Size and complexity of	The case study should have scale and	3	< 1 Cr. active users	1

#	Dimension	Criteria	Indicative Criteria	Max marks	Scoring guidelines	Marks per Criteria
		project in case study	complexity comparable to LIC scale		1-3 Cr. active users	**2**
					> 3 Cr. active users	**3**
	Total				**6**	

The bidder shall provide a case study providing details of a project with proposed tech components of Audience Management Tools(s) that will be verified by LIC (Max Marks – 3).

In case, the bidder does not have a case study with the proposed OEM, the bidder can submit a case study for Audience Management Tools(s) with similar scope of work as defined in the RFP with any other OEM. However, the maximum marks will then be 75% of the total.

#	Dimension	Criteria	Indicative Criteria	Max marks	Scoring guidelines	Marks per Criteria
2	**Bidder's Experience**	Case study scope	The case study should cover Audience Management elements as described in RFP	**0.5**	None or very few of the specific scope elements are addressed OR the scope mentioned is not clear.	**0**
					Most scope elements are addressed. But not all are detailed out completely.	**0.25**
					All scope elements are addressed; descriptions and deliverables are specific and detailed.	**0.5**
		Solution architecture design	The case study should cover all the architectural elements of Audience Management System/Tool(s) as described in RFP for Audience Management	**0.5**	No or incomplete Solution design/architecture	**0**
					Many of the architectural elements are addressed in the case study. A few non-critical components are missing and/or the description is unclear in some places.	**0.25**
					All architectural elements are addressed; descriptions are specific and detailed.	**0.5**

#	Dimension	Criteria	Indicative Criteria	Max marks	Scoring guidelines	Marks per Criteria
		Size and complexity of project in case study	The case study should have scale and complexity for the proposed Audience Management solution, comparable to LIC scale	2	< 1 Cr. active users	1
					1-3 Cr. active users	1.5
					> 3 Cr. active users	2
Total						**3**

The bidder shall provide a case study providing details of a project with proposed tech components of AB/MVT Testing Tools(s) that will be verified by LIC (Max Marks – 3).

In case, the bidder does not have a case study with the proposed OEM, the bidder can submit a case study for AB/MVT Testing Tools(s) with similar scope of work as defined in the RFP with any other OEM. However, the maximum marks will then be 75% of the total.

#	Dimension	Criteria	Indicative Criteria	Max marks	Scoring guidelines	Marks per Criteria
3	**Bidder's Experience**	Case study scope	The case study should cover all the scope elements of AB/MVT Testing as described in RFP	0.5	None or very few of the specific scope elements are addressed OR the scope mentioned is not clear.	**0**
					Most scope elements are addressed. But not all are detailed out completely.	**0.25**
					All scope elements are addressed; descriptions and deliverables are specific and detailed.	**0.5**
		Solution architecture design	The case study should cover all the architectural elements of AB/MVT testing Tool(s)	0.5	No or incomplete Solution design/architecture	**0**
					Many of the architectural elements are addressed in the case study. A few non-critical components are missing and/or the description is unclear in some places.	**0.25**

#	Dimension	Criteria	Indicative Criteria	Max marks	Scoring guidelines	Marks per Criteria
			as described in RFP		All architectural elements are addressed; descriptions are specific and detailed.	0.5
		Size and complexity of project in case study	The case study should have scale and complexity comparable to LIC scale	2	< 1 Cr. active users	1
					1-3 Cr. active users	1.5
					> 3 Cr. active users	2
		Total				**3**

5.5 BCP (Revised)

Category	Metric	Expectation
Service Availability (uptime) Uptime = Time since the system was deployed	Front-end applications (AB/MVT application frontend, Campaign Management System frontend, Audience Management Frontend)	**99.50%** (Monthly) – for Campaign Management – 3h 39 min - downtime/month 99% (Monthly) for rest of the systems
	AB/MVT application backend and APIs, Campaign Management System backend and APIs, Audience Management backend and APIs	**99.50%** (Monthly) – for Campaign Management – 3h 39 min - downtime/month 99% (Monthly) for rest of the systems
	Integration and Internal APIs, Tokenization and Data Vault Module for tokenization, secrets management and encryption/decryption	**99.50%** (Monthly) – 3h 39 min - downtime/month
Disaster Recovery	RPO - Recovery Point Objective	Up to 3 hours
	RTO - Recovery Time Objective	Up to 12 hours

Penalties for SLA uptime (Revised)

S. No.	Uptime Range	Penalty
1	99.40% to below 99.50%	1% of operational quarterly invoice amount for every defaulting month
2	99.30% to below 99.40%	2% of operational quarterly invoice amount for every defaulting month
3	99.20% to below 99.30%	3% of operational quarterly invoice amount for every defaulting month
4	99.10% to below 99.20%	4% of operational quarterly invoice amount for every defaulting month
5	99.00% to below 99.10%	5% of operational quarterly invoice amount for every defaulting month

6.1.4. Availability (Revised)

Sr No	Metrics	Threshold	Penalty for shortfall
1	Uptime of Production environment	99.50%	Rs. 50 Lakh per month
2	Uptime of Non-Prod environments	85%	Rs. 25 Lakh per month
3	Uptime of the monitoring tools for Prod environments	99.50%	Rs 25 Lakh per month
4	RTO (Recovery Time Objective)	Up to 12 hours	Delay beyond 5 minutes to 10 minutes: Rs 25 Lakh Delay beyond 10 minutes: Rs 100 Lakh
5	RPO (Recovery Point Objective)	Up to 3 hours	Rs. 100 Lakh per instance

Note: All other terms and conditions, forms of the RFP document remain unchanged. In case of any ambiguity, the RFP document will stand.

Date: 5th August 2024
Place: Mumbai

Executive Director
(IT & Digital Transformation)