



Request for Proposal
Contact Center and Helpdesk Management Solution



1. Introduction

The Institute of Chartered Accountants of Pakistan invites proposals from qualified and experienced vendors to deliver a comprehensive Omnichannel Customer Support, Ticketing, and Contact Center Solution that will serve as a unified platform for managing all customer interactions.

The proposed system should seamlessly integrate multiple communication channels including voice, email, SMS, and live chat into a single interface, enabling consistent and efficient engagement with customers. The solution is expected to incorporate intelligent automation capabilities to streamline support processes, optimize ticket handling, and reduce response times, while also leveraging advanced analytics and real-time reporting to provide actionable insights into performance and service quality. Ultimately, the platform should enhance overall customer experience, improve operational efficiency, and empower support teams with the tools needed to deliver timely, effective, and high-quality service.

2. Objective

The proposed solution aims to centralize customer support operations across all communication channels into a unified platform, enabling seamless engagement through voice, chat, email, SMS. It is designed to streamline and automate workflows, ensuring efficient ticket lifecycle management from creation to resolution while minimizing manual intervention.

The system will leverage advanced AI capabilities, including intelligent skills-based routing and chatbot functionality, to enhance response accuracy and reduce resolution times. Additionally, it will provide robust real-time analytics and reporting tools, offering actionable insights into ticket volumes, agent performance, and overall service efficiency. By integrating these capabilities, the platform will significantly improve customer satisfaction levels while simultaneously boosting agent productivity and operational effectiveness.

3. Scope of Services

The selected vendor will:

- Deploy and configure the platform
- Integrate communication channels and APIs
- Configure IVR, workflows, and automation rules
- Provide dashboards, reporting, and analytics
- Train users and administrators
- Provide ongoing support and maintenance

4. Functional Requirements

a. Ticketing & Case Management

- Web-based ticket creation
- Ticket assignment to teams/agents
- Web-to-ticket functionality
- Shared inbox

b. Unified Agent Experience

- Unified Agent Panel (UAP)
- 360° Customer Profile Management



- Mobile App (Agent & Manager)
- c. Omnichannel Communication**
 - Email channel with two-way communication
 - SMS channel
 - Live chat
 - Omni-channel chat widget
 - Social channels (Facebook, Twitter, Instagram, LinkedIn)
 - WhatsApp Business API integration
- d. Voice & Contact Center Capabilities**
 - Voice channel support
 - WebRTC in-app dialer
 - Call recording (standard)
 - Whisper, Listen, Barge-in
 - Inbound routing
 - Multi-campaign management
 - Ring dialer (auto dialer, robo calls, TTS)
 - After-call feedback
- e. Automation & AI Capabilities**
 - Automation business rules (basic to advanced tiers)
 - AI-based intelligent skills-based routing
 - AI chatbot for self-service
 - Sentiment analysis
- f. Templates, Forms & Customization**
 - Pre-built templates (Email/SMS)
 - Custom fields
 - Dynamic form builder
 - Dynamic field listing
- g. SLA & Workflow Management**
 - SLA definition and tracking
 - Auto escalation and lifecycle management
- h. Knowledge & Self-Service**
 - Knowledge base
 - Self-service portal
 - Chat SDK (iOS, Android, native platforms)
- i. Reporting & Analytics**
 - Real-time dashboards
 - Customizable dashboards
 - Dynamic report builder
 - Reporting levels:
 - Basic reports
 - Advanced reports
 - Highly advanced analytics
 - Integration with BI tools (e.g., Power BI, Kibana)



j. Quality & Monitoring

- Quality Assurance (QA)
- Call monitoring tools

k. Customer Feedback & Surveys

- Survey builder (NPS, CSAT)
- Customer satisfaction tracking

l. Integrations & Extensibility

- CTI/API access
- Pre-built plugins and integrations

3.1 Intellectual Property

All documentation, and related materials developed under this engagement shall remain the **exclusive property of ICAP**.

Knowledge transfer is an integral part of the project:

- Architecture documentation
- API documentation
- Code walkthroughs
- Shadowing and handover sessions

No phase or the project in its entirety will be considered complete without complete knowledge transfer.

5. Technical / Eligibility Criteria

Sr. No.	Evaluation Criteria	Weightage (%)
1	Functional Compliance including ticketing, omnichannel support, voice, chatbot, SLA management, workflow automation, and reporting capabilities	35%
2	Technical Architecture, Scalability, Security, Compliance, and Integration capabilities with APIs, CTI, CRM, ERP, and third-party platforms	25%
3	AI, Automation, Reporting & Analytics capabilities including intelligent routing, chatbot, sentiment analysis, dashboards, and BI integration	20%
4	Vendor Experience, Implementation Methodology, Training, Support Services, and SLA commitments	10%
5	Commercial Proposal and Total Cost of Ownership including licensing, implementation, maintenance, and scalability costs	10%



6. Financial Proposal Submission Guidelines.

All vendors are required to submit **two sealed envelopes** as part of their response to this RFP:

- **Technical Proposal**

The Technical Proposal must include:

- All documents related to eligibility, technical compliance, and proposed solution design.
- No financial information should be included in this envelope.
- Must be clearly marked: **“Technical Proposal – Contact Center and Helpdesk Management Solution”**

- **Financial Proposal**

The Financial Proposal must:

- Quote all amounts in PKR, clearly inclusive of all applicable taxes.
- Be submitted on the firm’s official letterhead, duly signed by the head of the firm or an authorized representative.
- Include a validity period of at least 120 calendar days from the date of submission.
- Clearly mention quoted amounts in both words and figures.
- Mention warranty details (if applicable), highlighted in bold.
- Ensure no overwriting, cutting, or erasing in the document.
 - Be clearly marked: **“Financial Proposal – Contact Center and Helpdesk Management Solution”**

- **Additional Compliance Requirements (Mandatory - Annexure A for Vendors Not Registered with ICAP)**

- The vendor must be:
 - Registered with Sales Tax and Income Tax authorities.
 - An active taxpayer, with NTN and GST registration in the firm’s name (not an individual’s).
- Proposals with conditional, partial, or optional items will be rejected.
- All applicable government taxes will be deducted from the billed amount as per law. A GST invoice must accompany the bill.
- The quoted solution must include complete supply, delivery, and commissioning at: ICAP House, G-31, Chartered Accountants Avenue, Clifton Block 8, Karachi.
- The Purchaser reserves the right to accept, reject, or cancel any or all bids without assigning any reason.



7. Clarification and Interpretation of the Document

The queries and clarification related to the document are to be submitted in writing to the stated address or email at imran.hafeez@icap.org.pk / procurement@icap.org.pk . Such queries should refer to the Section, Subsection, and page number of the document.

The queries should reach ICAP by **01 June 2026** via email, post or other appropriate medium, and will be addressed/ answered by email in response time of one working day.

It should further be noted that the Institute solely reserves the right to interpret the document. The responses to such queries, clarifications and interpretations will be made in writing. No other Interpretations will be binding on the Institute.

8. Bid Document

Caution: All Vendors are requested to read this document carefully and must fulfill the mentioned requirements otherwise they will not be allowed to participate.

1. ICAP Karachi, (hereinafter referred to as “the Purchaser”) invites / requests Proposals (hereinafter referred to as “the Bidders”) for supply and delivery of required services.

Queries of the Bidders seeking clarifications must be received in writing to the Purchaser within stipulated timeline. Any query received after deadline will not be entertained. ICAP Karachi may host a Q&A session, if required, at ICAP head office (Chartered Accountants Avenue Clifton block 8, Karachi). All Bidders shall be informed of the date and time in advance.

The Contact for all correspondence in relation to this bid is as follows:

Primary Contact

imran.hafeez@icap.org.pk

111-000-422-Ext:355

ICAP, Karachi

Secondary Contact

procurement@icap.org.pk

111-000-422-Ext:302

ICAP, Karachi.

2. Bidders should note that during the period from the receipt of the bid and until further notice from Primary Contact, all queries should be communicated via Primary Contact and in writing (e-mail) only. In the case of an urgent situation where Primary Contact cannot be contacted, the bidder may alternatively direct their enquiries through the Secondary Contact.
3. In accordance with these rules, interested Bidders applying for bids should submit two separate bids/envelopes for Financial Proposal and Technical Proposal. The envelopes shall be marked as “Financial Proposal” and “Technical Proposal” in bold and legible to avoid confusion. Initially, only the envelope marked “Technical Proposal” shall be opened. The envelope marked as “Financial Proposal” shall be retained in the custody of the ICAP Karachi without being opened.



4. ICAP Karachi shall evaluate the technical proposal in a manner prescribed in advance, without reference to the price and reject any proposal, which does not conform to the specified requirements.
5. Bidders will be solely responsible to deliver all required items/materials as well as to complete the project within the decided timeframe from all aspects.

The proposed schedule for the procurement process is as follows.

Activity	Date
RFP Advertisement	22 May 2026
Prospective bidders may submit questions and comments regarding RFP document by	01 June 2026
ICAP responds to questions and comments via email to all bidder(s)	02 June 2026
Bid submission	04 June 2026 latest by 5 pm
Bid Opening – Technical Bid	05 June 2026

9. Project Execution Model for Implementation

The bidders are required to furnish a relevant and detailed execution model for Design and Development IT Frameworks.

10. Training plan

The Implementer is required to provide training to all Users of the Institute. The purpose of the training is to fully equip the users with skills and knowledge to carry out the business processes.

Therefore, the bidders are required to submit in detail the professionally designed Training Plan Road Map at the following two levels:

- a) The User Level Training is mandatory part of implementation services and will be provided by the implementer to all the Users including Senior Management. The training should provide hands on learning to users to carry out day-to-day business activities and execute reports in the system.
- b) The Professional Level Training is to be provided to ICAP admin users in selected portals. The purpose of the training is to identify the features available in all solutions. Understand the working, processes of the solution, to be able to handle and manage the implementation services at advance level with clear understanding of solutions.

11. Payment Schedule

A payment schedule will be prepared after mutual agreement based on bid price:

- a. Deliverables as per agreement/Blueprint
- b. Time frame of Overall Contract Execution.



- c. Successful Acceptance Test.
- d. Training plan.
- e. Advance payment will be processed as per mutual agreed terms & conditions.
- f. Minimum 10% payment will be released after issuance of TOC for all modules

12. Mode of Payment

The development, deployment and Implementation rates are to be quoted in Pak Rupees.

13. Penalty Clause

The Penalty will be imposed @10% of quoted value, if project completion timelines are not met.

14. Conditions of Contract

- a. The bidder by submitting a proposal has agreed to abide by the Terms & Conditions and the Scope of work as defined in the document and is assumed to be 100% in agreement to terms and conditions floated in the document.
- b. **SECRECY**
 - a. The parties shall not at any time during or after the term of the agreement, divulge or allow to be divulged, to any person, any confidential information contractual arrangement, products, business or affairs of the parties.
 - b. Notwithstanding anything contained in the paragraph, no party shall be precluded from disclosing any information to the extent required in any legal proceedings.
- c. **AMICABLE SETTLEMENT**
 - a. The parties shall use their best efforts to amicably settle all disputes arising out of or in connection with this contract or its interpretation. In case of failure to amiably resolve, the matter shall be referred to arbitration and Council of ICAP will be appointed as sole arbitrator, whose decision will be binding on both parties.
In case of any Person/ Change of team, Firm will provide better or equal team at 'no' cost/disturbance of project.
- d. **PROTECTION OF ACCRUED RIGHTS**
 - a. The expiry or termination of this Agreement shall be without prejudice to any rights which have already accrued to either of the parties under this agreement.
- e. **GOVERNING LAWS:**
 - a. This Agreement shall be governed by and construed in accordance with Pakistan's law. The parties are entitled to amend the agreement, however, modification and amendments to this agreement shall be effective only if made in writing and signed by the parties or by their duty authorized representatives.



15. Client Reference – Successful Implementations

Sr. #	Client Name	Implementation Details	Contact Person (Name, Designation and Telephone no.)

16. Consultant/Project team Details

Sr. #	Consultant Name	Specialized Area	Firm Joining date	Total Experience in specialized area (No. of years)	Name of successful project in relevant expertise implemented



Enlisting of New Vendor/Service Provider (Annexure A)

Date : _____

Subject : _____

The Subject vendor is required for enlisting to ICAP vendors list. Following are the criteria as per procurement Manual.

Sr.	Requirement	Compliance / Details
1	Registered Name of the Company	
2	NTN / CNIC Number	
3	Sales Tax Registration under Sales Tax Act, 1990	
4	Official Address / Telephone / Mobile / Email	
5	Date and Place of Establishment of the Company	
6	Name of Proprietor / Owner / CEO	
7	CNIC Number of Proprietor / Authorized Person	
8	Name, Designation and Qualifications of Authorized Representative(s)	
9	Company Profile – Soft Copy Digital Platform	
10	Bank Account Maintenance Certificate for Financial Standing	
11	Bank Name, Title of Account, IBAN and Account Number	
12	List of major clients with contact details	
13	Type of Organization (Manufacturer / Importer / Trader / Service Provider / Contractor / Others)	
14	Disclosure of any relationship with ICAP employees (Yes / No – details if yes)	

Note:

For construction projects, statutory and technical requirements (including but not limited to PEC registration, relevant experience, financial capacity, manpower and equipment) shall be evaluated at the tender or project stage, in accordance with Section D of the Procurement Manual 2025.

Declaration:

We certify that the information provided above is true and correct. We understand that vendor enlistment does not guarantee award of any contract and all procurements are subject to ICAP's Procurement Manual 2025.

Name (authorized person)

Signature (authorized person)

Company Stamp & Date