



## TENDER NOTICE :

### Appointment of Service Provider for Telemarketing service for RHB Banking Group for the year of 2024 to 2027 (3 years)

Self-Registration Closing Date : 13<sup>th</sup> Dec, 2023

Self-Registration Link (Required for new vendor only) :

<https://www.rhbgroup.com/malaysia/group-procurement>

Please proceed to perform supplier self-registration if the following requirements are met:

1. Minimum company paid up capital and shareholder fund of RM200,000.
2. Preferably with past experience with at least 1 financial institutions & 1 corporate companies
3. Minimum 3 years of operation
4. Mandatory requirements:
  - 1) Vendor Experience & Recognition
    - a. Vendor should able to maintain the pricing for 3 years.
    - b. To submit all below documents:
      - i. Company's operating license
      - ii. Company's quality certification (ISO9001)
      - iii. Company achievement / recognition certification
  - 2) Able to provide Scope of Work below:
    - a. EPF / KWSP deduction of employee is required
    - b. to commit 8 hours' weekdays operation (exclude lunch hour)
    - c. Sales Call:
      - i. The Service Provider shall provide outbound telemarketing service for all RHB products which also includes all RHB banca products (Life & General Insurance and Takaful) ("Agreed Products") which functions shall include the following:
        1. setup system to support RHB campaign requirements including but not limited to providing the tele-sales representatives in accordance to the requirements set forth in the Work Order ("TSR");
        2. contact RHB's customers from RHB's Premises and/or Service Provider Premises by telephone from the Database provided by RHB ("Database"). Towards this purpose, the Service Provider shall ensure that the Database contain the name and telephone number of each RHB's customers ("Customer") as reasonably required by the Service Provider to perform the Services;
        3. make telephone sales presentations to the Customers;
        4. attempt to close sales with the Customers for the participation of the agreed products in accordance with the procedures set forth below;
        5. capture the Customers and payment details pertaining to the sales;
        6. perform Quality Audit on all the sales calls;
        7. generate sales file to RHB; and
        8. generate and delivery reports to RHB.

- ii. The Service Provider shall provide sales and other data in the format and frequency specified by Bank
- iii. The Service Provider shall perform the services in accordance with the key performance indicators set forth in the Work Order ("KPI").
- iv. The Service Provider shall be responsible and accountable to obtain customer necessary information by conducting customer due diligence (CDD)
- v. RHB shall review the Service Provider Performance based on the following:
  - 1. Yearly performance review – 70% based on the KPI; and
  - 2. Failure to perform:
    - 2.1 Warning letter will be issue in the event of failure in achieving the minimum of 70% of yearly KPI; and
    - 2.2 Termination or discontinuation of campaign if failure in achieving 70% of the KPI for the following 6 months after the issuance of the warning letter in accordance with Clause 6.1(a) of this Agreement.

d. Services call:

- i. The Telesales Representative (TSR) from the Service Provider to perform outbound telemarketing services on fundraising and/or donation for Environment, Social and Governance Activities (ESG) at RHB's and/or Service Provider premises from the Database provided by RHB.
- ii. Attempt to convince Customers for the participation of the Agreed Product (fundraising and/or donation for Environment, Social and Governance Activities (ESG)) in accordance with procedures required by RHB Bank
- iii. TSR to confirm the application details with the Customers and to update services details in ONYX system.
- iv. Team Manager from the Service Provider to download the report and to notify QA Representative from the Service Provider to perform quality audit check.
- v. QA Representative to verify all service calls to ensure Customers are being verified and applications details captured in the report are accurate before submission for enrolment/deduction of fundraising and/or donation.
- vi. The Service Provider shall be responsible and accountable to verify customer during phone enrolment

3) Manpower & Support

- a. To establish mobile team to support day to day operation if existing worker is on leave/mc/resign.
- b. Vendor to supply manpower & support accordance to the requirements set forth in the Work Order

4) Equipment

- a. To provide Office Furniture / Equipment and Environment such as Desk and chair suitable for required tasks, Computer/laptop, Telephone headset/lines, Printer, Internet access, Photocopy machine, Shredder, Router/modem, Meeting/training room, Store room, Shelves/Cabinets, White board, Adequacy of ventilation / airflow, Adequacy and suitability of lighting & other Office Furniture / Equipment and Environment as per RHB Bank & BNM guideline.
- b. To provide Security such as Door access system, CCTV, Data Center/ Server Room, Security guard and other security's related as per RHB Bank & BNM guideline.
- c. To provide Fire Safety such as Fire Extinguisher, Fire Sprinkler and Fire Alarm & other Fire safety related as as per RHB Bank & BNM guideline.

5) Indemnity.

- a. Tenderers must follow and agreed all RHB Banking Group requirements.
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#### 5. High Level Scope:

- 1) Professionalism in servicing and able to meet tight deadline during critical situations.
  - 2) Equipped with strong helpdesk setup with tracking mechanism to smoothen two-ways communication between vendor and complainant.
  - 3) Responsive for enquiries, requests and cases lodged by RHB Banking Group team in HQ / branches.
  - 4) Coverage of below entities:
    - a. RHB Bank Berhad
    - b. RHB Investment Bank Berhad
    - c. RHB Islamic Bank Berhad
    - d. RHB Insurance Berhad
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