

# **RFP 23/2022: THE REQUEST TO APPOINT A SERVICE PROVIDER FOR WHATSAPP BUSINESS SOLUTION PLATFORM FOR A PERIOD OF FIVE (05) YEARS**

## **Communication #5**

**Date of Issue: 28 October 2022**

### **1. Answers to questions posed by Bidders**

These questions and answers as well as issued / reissued documents referred to in this document can be found on SARS's website at [www.sars.gov.za](http://www.sars.gov.za).

#### **Question and Answer**

<b>RFP Reference</b>	<b>RFP Statement</b>	<b>Query</b>	<b>Answer</b>
SARS RFP 23-2022 3-1 Business Requirements Specification Section 4 SOLUTION REQUIREMENT – SCOPE OF WORK Page 4/7	Enabling/establishing WhatsApp as an inbound/outbound channel from a technology perspective, considering SARS architecture and security standards.	What languages needs to be supported by the proposed solution?	The responses to users will be presented in English.
SARS RFP 23-2022 3-1 Business Requirements Specification Section 4 SOLUTION REQUIREMENT –	Enabling/establishing WhatsApp as an inbound/outbound channel from a technology	How many users / teams / bots will licenses be required for?	When the existing Live chat functionality is integrated into WhatsApp, the numbers of users required will be determined by

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SCOPE OF WORK Page 4/7	perspective, considering SARS architecture and security standards.		inbound demand that can range between 50 - 800
SARS RFP 23-2022 3-1 Business Requirements Specification Section 4 SOLUTION REQUIREMENT – SCOPE OF WORK Page 4/7	Enabling/establishing WhatsApp as an inbound/outbound channel from a technology perspective, considering SARS architecture and security standards.	Has SARS started to request consent from customers for proactive outbound WhatsApp messages?	This will be done as part of the change management and communication during project implementation.
SARS RFP 23-2022 3-1 Business Requirements Specification Section 4 SOLUTION REQUIREMENT – SCOPE OF WORK Page 4/7	Enabling/establishing WhatsApp as an inbound/outbound channel from a technology perspective, considering SARS architecture and security standards.	How many conversations does SARS expect per month.	The solution must be able to service a minimum of 20,000 messages per day to taxpayer-initiated conversations.  This is a new solution to SARS and the minimum of 20k messages is estimated during the initial phase of introduction.  The number of taxpayers is dependent on the number of responses in each unique conversation.
SARS RFP 23-2022 3-1 Business Requirements Specification Section 4 SOLUTION REQUIREMENT –	Enable the following service requests via a structured menu, that can be auto resolved by integration to back-end services:	Should the 5 requested services that must be automated, be partially	The solution required should enable existing service requests via a structured

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SCOPE OF WORK Page 4/7	<ul style="list-style-type: none"> <li>o Request Tax Reference Number</li> <li>o Request Statement of Account</li> <li>o Request Return Refund Status</li> <li>o Request Audit Status</li> <li>o Request Notice of Assessment</li> </ul>	automated or handled by a human agent?	menu, that can be auto-resolved by integration to back-end services.
SARS RFP 23-2022 3-1 Business Requirements Specification Section 4 SOLUTION REQUIREMENT – SCOPE OF WORK Page 4/7	<p>Enable the following service requests via a structured menu, that can be auto resolved by integration to back-end services:</p> <ul style="list-style-type: none"> <li>o Request Tax Reference Number</li> <li>o Request Statement of Account</li> <li>o Request Return Refund Status</li> <li>o Request Audit Status</li> <li>o Request Notice of Assessment</li> </ul>	Does SARS need Natural Language Understanding (NLU) support if the request services are going to be automated?	Natural Language understanding is not required for this solution.
SARS RFP 23-2022 3-1 Business Requirements Specification Section 6.6.1 Reports Page 7/7	In addition to all the reports already specified in the previous paragraphs, the client may request the service provider to provide other reports on an ad hoc basis.	For operational reporting, are there any specific reports / metrics / KPI's that need to be included?	SARS requires operational reporting on the health performance and any Service Level Agreements reporting as required
SARS RFP 23-2022 1-1 Summary Guidelines Instructions and Conditions (Main Bid Document)	A solution must be able to service a minimum of 20,000 messages per day, with at least minimum operating times from	How many customers is this supporting and what volumes are	The solution must be able to service a minimum of 20,000 messages per day to taxpayer-initiated conversations.

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<p>Table 6: Technical evaluation criteria, Point 2 Page 13/29</p>	<p>06:00 am to 18:00pm. The solution should be scalable to meet any potential growth</p>	<p>predicted for each use case and additional outbound messages?</p>	<p>This is a new solution to SARS and the minimum of 20k messages is estimated during the initial phase of introduction.</p> <p>The number of taxpayers is dependent on the number of responses in each unique conversation.</p>
<p>SARS RFP 23-2022 1-1 Summary Guidelines Instructions and Conditions (Main Bid Document)</p> <p>Table 6: Technical evaluation criteria, Point 6 Page 15/29</p>	<p>The Bidder to provide ongoing training for the enablement of SARS resources to be able to provide support to SARS internal and external customers. The Bidder will be expected to provide support services which will include fault or query escalation process.</p>	<p>As per phase 1 of this RFP – the successful Bidder will ONLY provide a WhatsApp Business Platform to SARS. There are no Agents involved that will conduct Live Chats to Customers on behalf of SARS – therefore NO Agents Training will take place in phase 1.</p> <p>Please confirm if understanding is correct.</p>	<p>Yes, there is no agent training requirement expected from the Service Provider.</p> <p>However, the Service Provider will be expected to provide ongoing training for the enablement of SARS resources.</p> <p>The Service Provider will also be expected to provide support services, which includes fault or query escalation process.</p>

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			SARS expects Service Providers to provide a general outline and timeline of their training to support SARS technical staff.
SARS RFP 23-2022 1-1 Summary Guidelines Instructions and Conditions (Main Bid Document)  Table 6: Technical evaluation criteria, Point 6 Page 15/29	The Bidder to provide ongoing training for the enablement of SARS resources to be able to provide support to SARS internal and external customers. The Bidder will be expected to provide support services which will include fault or query escalation process.	<ul style="list-style-type: none"> <li>• How long after Phase 1 implementation will Live Chat start?</li> <li>• Should bidders include in their response – Training schedules, Training Manuals; and other related evidence of Live Chat Training?</li> </ul>	<p>Live chat is an already existing functionality/service at SARS.</p> <p>Extending the existing Live Chat functionality to WhatsApp will be determined after WhatsApp implementation.</p> <p>Yes, Service Providers should include in their response – Training schedules, Training Manuals; and any other related evidence for technical support staff</p>
SARS RFP 23-2022 1-1 Summary Guidelines Instructions and Conditions (Main Bid Document)  Table 6: Technical evaluation criteria,	The Bidder to provide ongoing training for the enablement of SARS resources to be able to provide support to SARS internal and external customers. The Bidder will be expected to provide support services which	<ul style="list-style-type: none"> <li>• Please elaborate on how the support service of fault or query escalation process relate to Training?</li> <li>• Please clarify if this will be a technical support service (Help Desk) on Platform Faults or escalations?</li> </ul>	The SARS technical support staff are required to understand the technical solution in the event of any incidents resulting in unavailability of the service to either the customers or service

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Point 6 Page 15/29	will include fault or query escalation process.	<ul style="list-style-type: none"> <li>• Would the service provider be required to Train the fault / escalation process? If so – to who?</li> </ul>	<p>consultants before they escalate to the service provider.</p> <p>Such incidents may not require escalation but rather resolution by the SARS technical support staff.</p> <p>Fault logging, incidents and escalation processes will be defined in the SLA.</p>
SARS RFP 23-2022 Communication 2  SARS Response to Question 3	Live chat does not form part for the phase 1 of this tender, the number of agents required is determined by volumes and could range between 50 and 800	<ul style="list-style-type: none"> <li>• What expected Training will be required in Phase 1?</li> <li>• If it is Technical Training (On how the WhatsApp Platform works) – will this Training be for SARS Customers and SARS Employees?</li> </ul>	<p>SARS requires training on the technical solution of the proposed service.</p> <p>The training will be for SARS support staff to understand the technical solution.</p>
SARS RFP 23-2022 3-1 Business Requirements Specification  Section 5 - 5.5 DATA SECURITY - GOVERNANCE AND COMPLIANCE	5.5 The solution should be positioned as Software as a Service and must support cloud-based data/message storage through a local (within the borders of South Africa) based service provider.	<ul style="list-style-type: none"> <li>• Is it <u>compulsory</u> for the data/messages to be stored in a datacentre in South Africa?</li> <li>• If the proposed Software as a Service, cloud-based solution store data and messages in a Datacentre located in Ireland but the Datacentre</li> </ul>	<p>The solution should be positioned as Software as a Service and must support cloud-based data/message storage through a local (within the borders of South Africa) based service provider.</p>

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Page 5/7		<p>complies with global data security, governance, compliance, GDPR and other protection of personal information "acts and laws, will it still be a requirement to have the data and messages stored within the borders of South Africa?</p> <ul style="list-style-type: none"> <li>• Will our bid submission be "disqualified " if our solution do not store data and messages in a datacentre in South Africa?</li> </ul>	<p>It is a mandatory requirement that Data Centre be based within the borders of South Africa.</p> <p><b>NB:</b> Bidders will be evaluated as per the issued requirements and evaluation criteria (Prequalification, Mandatory, Technical and Price &amp; B-BBEE)</p>