

Request for Proposal (RFP) - Customer Centricity Toolkit Development

Introduction

i3-Access, a leading organization in the field of promoting financial health, is seeking proposals from experienced vendors to develop a Customer Centricity Toolkit that is aimed at the financial sector industry. This toolkit is part of our broader initiatives within the Financial Health Community of Practice, which seeks to mainstream the agenda of financial health among policy makers, private sector entities, and other stakeholders.

Project Overview

The goal of this project is to develop a comprehensive Customer Centricity Toolkit that will enable the financial sector industry to take a customer-focused approach when developing products and services. The toolkit should provide practical guidance, resources, and hands-on training in customer-centric methodologies such as Human-Centered Design, Startup Canvas, Design Thinking, Behavioral Science, and more.

Scope of Work

The selected vendor will be responsible for the following:

- **Toolkit Development:** Create a comprehensive online toolkit that covers various customer-centric methodologies and approaches. The toolkit should be suitable for self-paced learning and include interactive content.
- **Learning Management System (LMS) Integration:** Develop the toolkit as an online course that can be hosted on a Learning Management System (LMS) to facilitate easy access and tracking of user progress.
- **Interactive Bot:** Create an interactive bot or chatbot that guides users through the toolkit, answers questions, and provides assistance as needed.
- **Content Creation:** Develop high-quality written content, visual aids, videos, and interactive exercises to make the toolkit engaging and informative.
- **User Experience (UX) Design:** Ensure the toolkit has an intuitive and user-friendly interface for seamless navigation.
- **Feedback Mechanism:** Implement a mechanism for users to provide feedback on the toolkit's effectiveness and content quality.
- **Documentation:** Prepare documentation that outlines how to use and maintain the toolkit.

Proposal Submission Requirements

Interested vendors are requested to submit a brief proposal that includes the following:

- **Company Information:** Provide an overview of your company, including its history, relevant experience, and expertise in developing similar toolkits working in field of education technology and content.
- **Team Expertise:** Detail the qualifications and experience of the team members who will be working on this project, including instructional designers, content creators, UX/UI designers, and chatbot developers.
- **Project Approach:** Describe your proposed approach to developing the Customer Centricity Toolkit, including methodologies and technologies you plan to use.

- **Timeline:** Provide a project timeline that includes key milestones and estimated delivery dates.
- **Budget:** Present a detailed budget that outlines all costs associated with the project, including development, content creation, LMS integration, and ongoing maintenance.
- **Portfolio:** Share examples of similar projects you have completed, especially those related to e-learning through new technologies.

Proposal Submission Deadline

All proposals must be submitted by 24 September 2021 at financialhealth@i3access.org

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

Relevance and Experience: Vendor's experience in developing e-learning content specially with new technology.

Technical Expertise: Expertise in using relevant technologies, including LMS integration and chatbot development.

Project Approach: The proposed approach to developing the toolkit, including content creation and user experience design.

Budget: The reasonableness and competitiveness of the proposed budget.

Contact Information

For inquiries and proposal submissions, please contact:

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