



## **RFP # IC2021-01: NPS survey service**

**January 13, 2021**

This document is a request for proposals (RFP) concerning the provision of a NPS (Net Promoter Score) survey to Caisse populaire acadienne Itée (UNI). The selected supplier shall provide NPS survey services on an as and when requested basis.

The requirements set out in this RFP are based on a recent review of service level requirements and are considered the minimum acceptable service levels to be maintained under the terms of the Agreement. Any data herein are provided strictly for estimation and evaluation purposes and are subject to change during the term of the Agreement as deemed necessary to meet the institution's requirements. Any change to service level requirements during the term of the Agreement may result in renegotiation of prices (where said change is deemed significant) at the institution's sole discretion. At this time, the institution is not anticipating that any significant changes to service levels will be necessary.

Upon selecting a supplier from among all proposals submitted, the institution reserves the right to negotiate a final Agreement for the provision of a NPS (Net Promoter Score) survey. However, the final Agreement will not necessarily award any supplier total exclusivity in light of the fact that the institution's requirements may involve the purchase of services outside of this Agreement with a view to meeting the institution's requirements in a timely and effective manner. The institution anticipates that this situation will be rare to non-existent.

### **Term of Agreement**

The final Agreement for the provision of NPS survey service shall enter into effect on or before March 1, 2021, and remain in effect until December 31, 2022. The Agreement may be extended by mutual consent of the parties subject to additional negotiation where appropriate.

## **Submission of proposals in response to this RFP**

Proposals in response to this RFP shall be submitted to Ian Cormier, Supply Chain Specialist, by e-mail to [ian.cormier@uni.ca](mailto:ian.cormier@uni.ca) or by postal mail to UNI, 295 Saint-Pierre Boulevard West, P.O. Box 5554, Caraquet NB E1W 1B7, by **February 5 2021, at 4:00 p.m.** Proposals received after this deadline will not be reviewed or considered. The official date of receipt of proposals shall be the date and time on which the e-mail was sent to the aforementioned supply chain specialist or, for proposals submitted by postal mail, the postmark date.

When selection of a supplier has been finalized, we will contact all suppliers that submitted proposals to inform them whether their proposal was accepted or rejected.

## **Pricing**

The price proposed for the provision of services under this Agreement shall include all related costs. It is understood that the proposed price is subject to applicable taxes (HST) and should consequently be exclusive of said taxes.

All potential suppliers responding to this RFP shall also include samples of previous of NPS surveys previously done.

All proposals shall include the terms of payment specified in the Agreement.

## **Statement of work**

The selected supplier shall be expected to provide the following services under the terms of the Agreement:

### **Survey**

- Develop business rules and a questionnaire supporting effective tracking of net promoter scores (NPS) and other satisfaction measures based on UNI's requirements.
- Collect respondents on an ongoing basis at 100 client members per week for an annual total of approximately 5,000 client members through a mixed online/telephone methodology.
- Submit a monthly results report including a comparison within the banking industry.

### **Tracking platform**

- Create a scorecard for live tracking of measurement results in the form of a personalized, user-friendly interface supporting effective client experience management.
- This scorecard shall also support the filtering of results (by region, business location, service or other criterion).

- Implement a feedback loop featuring automatic triggering of alert and follow-up modules when dissatisfaction events occur by e-mailing the manager at the business location so they can reach out to the dissatisfied respondent.
- Deliver training on follow-up techniques to UNI managers.
- Make platform updates and enhancements.

### **Mandatory criteria**

The following mandatory criteria constitute part of this RFP. Proposals from prospective suppliers that fail to meet all mandatory criteria may be rejected outright.

- Expertise, specifically in NPS measurement as well as other satisfaction measures.
- Access to an experienced team of interviewers, majority bilingual, for telephone collection.
- Access to technical support relating to platform use.
- Access to feedback loop training.
- The selected supplier shall include with its proposal samples of previous work relating to recent surveys.
- The selected supplier shall be able to meet the various IT security, data management and compliance requirements prescribed by UNI.
- The selected supplier shall have sufficient human resources capacity to ensure the continuous provision of services under the Agreement. This shall include ensuring that all substitute team members have received proper training and are able to uphold the service levels required under the Agreement.
- The project manager must have the ability to converse in French.
- The selected supplier shall include with its proposal a document confirming that it fulfils the mandatory and supplemental criteria.

### **Screening criteria**

The supplier shall be selected based upon all considerations described in the RFP including, but not limited to, pricing. UNI reserves the right to select a supplier based on qualifications regardless of whether the supplier is the lowest bidder. It further reserves the right to award the Agreement wholly or in part to any supplier. UNI reserves the right to exclude or disqualify any prospective supplier as it deems necessary. Finally, the institution reserves the right to reject all proposals submitted if it considers none to be satisfactory in terms of anticipated value and to reinstate the RFP process as it deems necessary.

### **Contact information**

All communications concerning this RFP shall be addressed to Mr. Ian Cormier, Supply Chain Specialist, by e-mail to [ian.cormier@uni.ca](mailto:ian.cormier@uni.ca) or by phone at 506-726-4502 no later than **January 22 2021 at 4:00 p.m.** . Prospective suppliers shall not directly contact any business location or other party concerned by this RFP; prospective suppliers that do so may be disqualified from the RFP process.

### **Termination of agreement**

The Agreement shall expire automatically at the end of the aforementioned term unless the parties agree mutually to an extension. Additionally, UNI reserves the right to terminate the Agreement with 30 days' notice if it deems the level of service provided by the supplier to be unsatisfactory. In this event, UNI agrees to provide the supplier in question full details concerning the unacceptable service level and ample opportunity to correct the situation. Should the supplier correct the situation to the satisfaction of UNI, then notice of termination of the Agreement shall be withdrawn and the Agreement shall remain in force, in its original form and subject to the original conditions, as if no notice of termination had been given.