

SOUTH INDIAN BANK LTD.

MARKETING DEPT, MARKET ROAD

ERNAKULAM

RFP: REQUEST FOR PROPOSAL

FOR SELECTION OF AGENCY FOR SOCIAL MEDIA MARKETING

Contents

About South Indian Bank	3
About RFP.....	3
Right to Accept/Reject Proposal	3
Definitions.....	3
Objective	4
Disclaimer.....	4
Scope of Work.....	4
Social Listening.....	5
Social Advertising & Outreach	6
Digital Platforms & Solutions	8
Mobile Solutions	8
Employee Penetration	9
Service Charges for the mentioned Scope of Work.....	9
Important Information.....	10
SIB Administrative/Technical Queries/Escalation Team.....	10
Organizational Profile	11
Organizational Escalation Team & Technical Queries	13
Past Experience	13
Selection of the Vendor	14
Eligibility Criteria	14
Questionnaire	15
Communication Details.....	17

About South Indian Bank

The South Indian Bank Ltd. is a leading Commercial Private Sector Bank in India with a rich history of 86 years, a pole position achieved, as a result of an enduring pursuit of excellence and an intense desire to understand the needs of the customers, by providing best of breed products & services. The Bank's products are designed from core values strengthened by a rich tradition and technology at its best. South Indian Bank, as on 31st March 2015, had achieved a total business Rs 89,905 Crore comprising a deposit base of Rs 51,951 Crores and advances at Rs 37,954 Crore. The Bank has a well spread network of 828 branches, 29 extension counters, supplemented by ATM networks of 1249, ensuring our footprint in 28 states/ Union Territories of India. The Bank has strong capital base with a diverse share holding pattern. The South Indian Bank Ltd. is proud to patronage of more than 5 million customers. More than 50 % of branches are located in Southern India and this large customer group penetration will help to reach masses fast.

As a part of strategising its social media channels, South Indian Bank has started a new team for managing the social media platforms of the bank. In order to monitor its social media channels such as Facebook, Twitter, Google Plus, YouTube, Instagram etc and keep it updated, the bank requires a vendor who can pro actively manage the social media channels.

About RFP

The Bank wishes to select a vendor who can undertake the activity of providing the services as described elsewhere in the Scope of Work for Social Media Marketing. In this connection invites sealed offers (Conformity to Eligibility Criteria & Scope of Work) for Social Media Marketing across the country as per Eligibility Criteria, Organizational Profile, Past Experience & Scope of Work mentioned elsewhere in this document.

The RFP document is not a recommendation, offer or invitation to enter into a contract agreement or any other arrangement in respect of the services. The provision of the services is subject to observance of selection process and appropriate documentation being agreed between the Bank & the selected vendor as identified by the Bank after the completion of the selection process

Right to Accept/Reject Proposal

Bank reserves the right to accept or reject any proposal, and to annul the proposal process and reject all proposals at any time prior to award of contract, without thereby incurring any liability to the affected bidder(s) or any obligation to inform the affected bidder(s) of the grounds for such decision

Definitions

1. "Bank" or "SIB" means unless excluded by and reputed to context or the meaning thereof, shall mean "South Indian Bank", described in more detail in the paragraph 1 above and which has invited vendors to submit proposals under this Request of Proposal and shall be deemed to include successors and permitted assigns
2. RFP means Request of Proposal prepared by South Indian Bank for the selection of service provider

3. "Bidder" means a vendor submitting the proposal in response to this RFP
4. "Solution" means providing the services put forward in the Scope of Work mentioned elsewhere in this document
5. " Proposal" means that Technical & Financial proposal as per the formats prescribed in the RFP
6. "Contract" means the agreement signed by successful bidder and the Bank at the conclusion of the selection/bidding process
7. "Successful Bidder " means the bidder who is selected after the conclusion of the bidding/selection process, subject to compliance to all the conditions of the RFP etc

Objective

The Bank wishes to select a vendor who can undertake the activity of providing the services as described elsewhere in the Scope of Work for Social Media Marketing and Digital Services for a period of 1 year contract

Disclaimer

SIB is not committed either contractually or in any other way to the applicants whose applications are accepted. The issue of this Request does not commit or otherwise oblige the Bank to proceed with any part or steps of the process. Subject to any law to the contrary, and to the maximum extent permitted by law, SIB and its directors/officers/employees/contractors/agents and advisors disclaim all liabilities (including liability by reason of negligence) from any loss or damage, cost or expense incurred or arising by reasons of any person using the information and whether caused by reasons of any error, omission or misrepresentation in the information contained in this document or suffered by any person acting or refraining from acting because of any information contained in this Request document or conduct ancillary to it whether or not the loss or damage arises in connection with any omission, default, lack of care or misrepresentation on the part of SIB or any of its officers, employees, contractors, agents or advisors.

Scope of Work

The vendor must be able to cover the following activities in social media:

1. **Social Listening** - Earned, Owned & Paid Media
 - a. Listening Tools and their usage -The Tool should crawl the relevant online platforms including Social Media Platforms, Forums, Blogs, News, Communities, Websites, etc. to aggregate content for the Bank's products/services, key competition etc
2. **Response Management:** Managing responses on online platforms within stipulated Turn Around Time (TAT) on a 24/7 basis. Agency should have strong response management capabilities (both earned & owned channels)
3. **Social Advertising & Outreach across diverse platforms** : Develop & execute a targeted social media advertising program to reach out to target stakeholders, namely existing and potential customers

4. **Digital Platforms & Solutions**
5. **Mobile- Social Integration** (App creations for various products, services or platforms)
6. **Media Buying** (Social & Digital) **supervision & services**
7. **Periodic Market Research & Analytics** : Market Research (Sample based) should be preferably done on a quarterly basis. It should cover latest developments in other banks and should point out where SIB stands. It should provide insights for the future development of SIB and campaign ideas. Customer engagement, reach levels, competitive analysis, share of voice, demographic analysis, key themes, dimension analysis etc are to be covered as well. Market research prior to new product or service launch should be done. Testing (Random, Split A/B Testing) and insights should be provided as well.
8. **Product, service & process knowledge of the bank**
9. **Employee Penetration:** Training for the employees
10. **Event & Campaign Management** (esp online) : Promote events and exhibitions
11. **Endorsements & General Promotions** (esp online): Endorse scientific research for professionals and the community
12. **Search and Display of the Brand and product Campaigns** (Banner ads, App ads etc)
13. **Search Engine Management & Optimization**
14. **E- mail Marketing**
15. **Web designing & analytics**
16. **Poster Designing**
17. **Brand Management-** Managing brand image of the Bank on Social Media Platforms
18. **Content Management-**Development and posting of content at Bank's official pages as per the requirement of the Bank
19. **Other Services that the vendor can offer**

Social Listening

The vendor should have the required credentials & tools for monitoring , managing & reading insights from all earned media. This analytics should not be confused with platform-based analytics and campaign analytics delivered by platforms viz. Facebook. The vendor should demonstrate capabilities in this area.

Influencer, Tracking & Management : involves tracking influencers in the social space, especially on our active platforms like Facebook & Twitter

Objective based Reporting: Reporting has 2 approaches. One is based on **Owned & Paid Channels** like facebook, twitter, etc. where the brand is present Owned Channel reporting measures the channel performance in detail & provide insights, highlights & lowlights. The second approach is reporting on **Earned Mentions** - here the objective varies from monitoring the Brand Health in the social space to tracking the competition to tracking the industry & deriving actionable insights

Social Listening Tools: The vendor should agree based on merits on the usage of tools by the bank. The vendor domain knowledge in addition to market tools will be important.

Ad- hoc & Special Reports

- a. **Ideation & execution of social led campaigns:** can be large or small campaigns aligning to traditional campaigns
- b. **Special reports:** include which analyze, provide insights & learning and most importantly provide status on campaign performance. these reports can be special tracking exercises done on specific brands or on specific efforts or on common situation in the country or on an industry related change for eg: RBI Guidelines & acceptance of people/ users

Social Advertising & Outreach

Currently SIB has marked its presence across 7 platforms such as Facebook, Twitter, Google Plus, LinkedIn, YouTube, Instagram, Wiki. We are also present in Skype (exclusively for NRIs). We are on the process of entering platforms like Whatsapp, Pinterest & Slideshare

Business Impact

- a. The vendor should ensure that there is gain in business from efforts in social media marketing
- b. Recommendations on potential clients , respective products, services & apps should be made based on social listening & campaigns
- c. Recommendations to improve existing products should be made through popular comments in social media

Channel Wise Activity**i. Facebook**

- a. Page management
- b. Find & remove fake pages (Merging)
- c. Achieve page verification
- d. Content architecture & calendar, messaging & managing conversations
- e. Customer Query & Support Management - Maintain Script book
- f. Evergreen posts, presence & response management, spam management
- g. Organic relationship building with fans/TG, building conversations
- h. Tab Creation
- i. Track fan activity & profiling , including influencers
- j. Campaigns & engagement
- k. Reporting
- l. Create or join relevant groups
- m. Cross promotion on other platforms

ii. Twitter

- a. Account management
- b. Find & remove fake pages
- c. Achieve page verification
- d. Enable conversations on owned & across Twitter
- e. Content architecture & Calendar, Messaging & managing conversations
- f. Customer Support & query management

- g. Track fan activity & profiling, including influencers
 - h. Create or join relevant groups
 - i. Reporting
- iii. Youtube**
 - a. Channel management
 - b. Content Management
 - c. Periodic video uploads
 - d. Creating appropriate asset fields - tags, titles, video quality, thumbnails etc
 - e. Grow subscriptions
 - f. Follow relevant channels
 - g. Cross promotions on social platforms
- iv. Google Plus**
 - a. A/c Management
 - b. SEO & SEM
 - c. Other opportunities
- v. Wiki**
 - a. A/c management
 - b. Content Management & Updating
 - c. Other opportunities
- vi. LinkedIn**
 - a. A/c management
 - b. Create or join relevant groups
 - c. Identify relevant opportunities' to participate in various groups & discussions
 - d. Build network & engage the target group
 - e. Presence management
- vii. Instagram**
 - a. A/c management
 - b. Identify opportunities
 - c. Event & Contest Promotions
- viii. Skype**
 - a. A/c creation & management
 - b. Security & Maintenance
 - c. Customer Support-Maintain Script Book
- ix. Whatsapp**
 - a. A/c Creation & Management
 - b. Identify promotion opportunities
 - c. Identify legal implications
 - d. Cross promotion activities
 - e. Customer Support & Management- Informal Script Book Maintenance
 - f. Customer Data Base Management
 - g. Timely Customer Greeting Mechanism
 - h. Identify other opportunities

x. Pinterest

- a. A/c creation & management
- b. Managing pin boards with suitable pins - images, videos etc
- c. Grow followers
- d. Engage with winners - especially to youth & women

xi. Slideshare

- a. A/c creation & management
- b. Promotion of products/ services as educational slides
- c. Educational powerpoints
- d. Identify opportunities

xii. Blogs

- a. Account creation & management
- b. Authoring blogs/collaborating with domain experts
- c. Blog moderation
- d. Growing the community
- e. On page & Off page SEO achievement

xiii. Other Platform Provisions

Digital Platforms & Solutions

The agency should provide digital solutions- website improvements, eCampaigns, digital media campaigns & more

Media buying and SEO/SCM suggestions should be made by the agency . The agency should lead these efforts with relevant partners

Aggregator sites: Ensure SIB presence in searches through the use of aggregator websites such as Bank Bazar, Policy Bazar, Money Control.com and many more relevant websites

Partnerships: Digital & social media targeted partnerships with consumer brands

Target Specific Segments: Ability to target specific customer segments like IT employees, college students etc

Mobile Solutions

All digital & social media marketing solutions should be enabled on mobile device. The agency should lead these efforts along with relevant partners.

The vendor should be able to plan, develop and execute media in digital & social properties

The vendor should have a dedicated team ensuring reputation management and response management. Best practices should be shared and implemented across social platforms

Mobile responsive posters and bulk mails should be designed

Opportunities for Mobile App Ads should be identified, notified and utilized Eg: Skip & non skip ads within popular mobile apps like hotstar, bank bazar, policy bazar, paytm etc

Opportunities for promotion within SIB Mobile App should be identified.

The vendor should be well equipped with knowledge on mobile apps, its creation, opportunity identification and utilization

Employee Penetration

The vendor needs to lead the development of social media policy for the bank. The vendor should be well- equipped with the market knowledge as well as the bank product, service & process knowledge. The vendor shall be given a training session regarding the bank details. The vendor should undertake training on social media, trends, usage with the employees of the bank. A detailed curriculum should be planned for this training program in consultation with the bank. The training shall be given to 10-15 officials of the bank with no extra cost to the bank.

Employees with social media accounts and social media training should be encourage for sustained activity on all platforms

Employee base should be leveraged to increase penetration in social media space

Internal employee groups should be created on social media platforms for discussions & updates.

Service Charges for the mentioned Scope of Work

Sl.	Scope of Work	Service Charge per month (Excl. of Tax)	Tax %	Tax Amount	Service Charges per month (Incl. of tax)	Months	Service Charges per Year (Incl. of Tax)
A	B	C	D	E= C*D	F=C+E	G	H =F*G
1	Social Listening, Response Management, Social Advertising & Outreach across diverse platforms, Digital Platforms & Solutions, Mobile-Social Integration, Media Buying, Market Research & Analytics, Product, service & process knowledge of the bank, Employee Penetration, Event & Campaign Management, Endorsements &						

	General Promotions, Search and Display of the Brand and product Campaigns, Search Engine Management & Optimization, E-mail Marketing, Web designing & analytics, Poster Designing, Brand Management, Content Management						
--	---	--	--	--	--	--	--

Important Information

Sl No.	Topic	Description
1.	Brief Description of the RFP	Selection of vendor for Social Media Marketing
2.	Bank Address for Communication	The South Indian Bank Ltd Marketing Department, 1st Floor, SIB Building, Market Road, Ekm-682035
3.	Date of Issue of RFP	21-11-2015
4.	Last date for any clarifications in the RFP	26-11-2015 (written reply for clarifications shall be provided from the bank's end on 27-11-2015)
5.	Last Date for Submission of RFP & Closure of the Bid	30-11-2015

SIB Administrative/Technical Queries/Escalation Team

Sl No.	Contact Points	Contact Details
1.	Ms. Seethalakshmi H (Social Media Marketing Officer)	9526516240
2.	Mr. Nikhil A B (Corporate Digital Marketing Officer)	8592077747
3.	Mr. Raghunath A (AGM)	9447000501
4.	Mr. Sony A (DGM)	9446375057

Organizational Profile

The vendor has to fill the table given below:

Sl No.	Topic	Description	Page no. of supporting documents
1.	Name of the agency		
2.	Constitution		
3.	Address (Order to be placed on which Office) Registered Office Corporate Office		
4.	Telephone No. Fax No. E-Mail Address Website		
5.	Date of Establishment of Company (enclose evidence)		
6.	Total work experience (In years)		
7.	Annual Turnover (enclose balance Sheet or CA's Certificate) 1) 2014-15		
8.	Is your agency a Proprietorship / Partnership or registered under the Companies Act. Please give details & enclose Certificate		
9.	List of present clients and types of online advertising & Social Media Marketing services provided		

	with year and amount: (enclose details)		
10.	List of government bodies the agency worked/working with and the type of services provided: (Enclose details)		
11.	Domestic Customer Base (No. of Clients where Social Media Marketing		
12.	Service Network (No. of Service Centres in) South India North India Central India West India North India		
13.	Details of past experience: (enclose details)		
14.	Details of Income Tax Registration: (Enclose PAN Details)		
15.	Service Tax Registration Details: (Enclose registration certificate)		
16.	Nature of Company whether exclusive Company or Separate Division (enclose details)		

17.	<u>Our Bank Details</u> Name & Style of Bank A/c Name of the Branch & Branch Address Account Number RTGS/NEFT Code		
18.	Any other information		

Organizational Escalation Team & Technical Queries

Sl No.	Contact Points	Designation	Contact Details	Experience
1.				
2.				
3.				
4.				
5.				
6.				
7.				

Past Experience

For each project being shown as relevant past experience of providing services being described in the document, please provide a profile based on the following template:

Please provide only the broad details of the project

Information Sought		
Sl.	Customer Name	
1	Name of the contact person from the client organization who can act as a reference with contact coordinates	
	Name	
	Designation	
	Address	

	Phone Number	
	Mobile Number	
	Email ID	
Project Details		
2	Project Title	
3	Start/End Date	
4	Current Status (In progress/Completed)	
5	No. of responding agency's staff deployed on this project (peak time)	
6	Order value of the project (in Rupees lakhs)	
7	Narrative Description of project: (Highlight the component/services involved in the project that are of similar nature to the project for which the Tender is floated)	
8	Description of actual services provided by the responding agency within the project and their relevance to the envisaged components/services involved in the project for which the RFP is floated	
9	Description of the key areas where significant contributions are made for the success of the project	
10	Order Copies & Performance Certificate received from the Client is to be attached with this statement	

Selection of the Vendor

The vendor shall be selected after they qualify the eligibility criteria and obtain maximum scores in the review. The details are mentioned below.

Eligibility Criteria

The vendor becomes eligible based on the following criteria:

1. Provision of basic proposal
2. 1 year of experience in social media marketing
3. 1 year experience in online reputation management
4. Submission of all relevant documents required for the RFP (mentioned elsewhere in document)

The vendor shall be evaluated based on the following

1. Profile of the Bidder
2. Past Experience
3. Media Buying
4. Road Map/Scope of Work
5. Client Base
6. Questionnaire Presentation
7. Meeting
8. Out of the Box Idea presentation
9. Awards & Accolades

10. Quote & Services Provided

*Note: The vendor should place relevant documents that prove their years of experience, no. of clients served, no. of projects done, ad buying and for questions that require documents in the questionnaire.

Questionnaire

1. How can the bidder help SIB connect more people online so that the bank gets more fan base, customer base, better brand identity and brand reach?
2. Propose a strategy which shall bring all the bank's customers into its social media pages as followers.
3. Propose a strategy which shall help in
 - a. new customer acquisition
 - b. cross- selling for existing customers
4. How will the bidder actively engage the audience in SIB's all online platforms? Is it just by cross promotion of same content in all platforms? Will the bidder deal each platform differently beyond the regular cross promotion activities? Or will the bidder deal each platform according to demographic and geographic factors? Explain the strategy
5. Currently SIB has platform presence in 7 platforms (FB, G+, YT, Linkedin, Instagram, Twitter, Wiki & also Skype- exclusively for NRIs). SIB is planning to get started in Whatsapp as well. Which among these platforms will be the best to improve fan base? Which are best to get customer leads? As a bidder, do you think, SIB has to enter other platforms beyond these? If so which, why and how?
6. A monthly content calendar (It comprises of contents such as posts that will be posted in SIB's all online platforms on a daily basis prepared for a month) is usually made in advance which is approved and the contents get promoted via SIB platforms. Prepare a framework for a relevant content calendar.
7. Identify the fake pages for each of SIB platform. Will the bidder be able to continuously monitor fraud /cloned sites using social media analytic tools and take measure to mitigate the same. Will the bidder be sharing the social media tools with the social media team of the bank for reference, once selected as the vendor? What are the tools that the bidder uses? Mention the same
8. How does the bidder plan to keep a track of comments & conversations about the adopted social media platforms?
9. Will there be a script book maintained for answering queries in the social media platforms?
10. If there is spamming on Bank's social networking site page, what are the actions that the bidder would take?
11. How will the bidder leverage social media tools & technology to improve the bank marketing efforts using social media?
12. How will the bidder promote the bank's products, social media pages, websites, apps and the brand via online advertising through search engines, websites, apps etc
13. Propose a plan to make our FB page as well as other pages verified? Explain

14. SIB has found the opportunity to provide customer support via platforms like FB, TW, Skype & Whatsapp. What are the other services that SIB could provide its customers via online platforms so that they feel connected?
15. Suggest a campaign that would improve SIB's FB page likes
16. Suggest a campaign, loyalty program and other TTL (Through The Line) activities that can be conducted via SIB's social platforms and explain what the campaign will help in achieving
17. What are the basic services the bidder provides? What are the add on services that the bidder can provide dedicated to SIB ?
18. Provide **Market research** with analytics (on SIB's social media presence compared to other banks esp in India). It should cover latest developments in other banks and should point out where SIB stands. It should provide insights for the future development of SIB and campaign ideas. Customer engagement, reach levels, competitive analysis, share of voice, demographic analysis, key themes, dimension analysis etc are to be covered as well. This should be conducted on a timely basis once the bidder gets selected as a vendor.
19. Share the best practices in online community management and how to effectively use Social Media as a platform to build brand
20. What are the SEO (on page & off page) strategies that the bidder can adopt to support the bank?
21. Please provide the creative ideas for improving the bank's blogging. Suggest certain topics for blogging that can grab attention, improve the reach and image of the bank. Will the bidder's blogging ideas improve the SEO of the bank? Will the bidder be able to provide contents and creative relevant for the blogging while working as the bank's vendor?
22. How can the bidder leverage the maximum output from the SIB YouTube channel? Propose a way to license and monetize the same?
23. We have bulk mail campaigns which require attractive mail template and consistent format. Design a framework for the same.
24. SIB Mirror is the bank's latest product. Kindly propose
 - a) Basic bulk mailer design with content for the same.
 - b) Common platform post design with content (for SIB's all online platforms)
 - c) Common web- banner design with content
 - d) Basic poster design with content
 - e) Is there any other online area where the bidder can promote the product? If so which all and why?
25. How will the bidder communicate that SIB is live on all platforms? Is it via bulk mail alone or through platform campaign as well.? (Hint: Mirror is a platform in which promotion can be done as well - What's New Section) .
26. Will the bidder be able to propose add on ideas for bank's mobile app SIB Mirror which can make it more customer friendly?
27. Will the bidder be able to list out the various relevant groups in social media platforms where the bank's contents can be posted and promoted?
28. What is the bidder's opinion on Southern Odyssey? Propose a method through which the bank can promote it via online platforms?

29. What are the technological add on services that the bidder can provide to promote the bank and its products?
30. From the below list, what are the services that comes under the bidder's package. Kindly tick them.
- ☐ Social Media Platform Management & Promotion
 - ☐ Social Campaigns and Advertisements
 - ☐ Application Creations for various platforms like Social Media and Mobile.
 - ☐ Search Engine Optimisation (SEO).
 - ☐ Search Engine Marketing (SEM).
 - ☐ Online Reputation Management (ORM).
 - ☐ Online Branding Campaigns.
 - ☐ Online Blogging (Creative as well)
 - ☐ Poster Designing- Generic
 - ☐ Poster Designing- Animated
 - ☐ Animation Videos
 - ☐ Search and Display of the Brand and product Campaigns (Banner ads, App ads etc)
 - ☐ Appraising the Bank Brand with latest insights, new development and innovations in the space of Digital Media
 - ☐ Endorsements & General Promotions
 - ☐ Market Research & Analytics
 - ☐ E-mail Marketing.
 - ☐ Mobile Marketing.
 - ☐ Web Designing.
 - ☐ Web Analytics.
 - ☐ Digital Creative production and adaptation.
 - ☐ Other Methods- Please specify if you provide other services not mentioned in the list

The above questions should be answered and send back to the bank before the bid closure date. The bidder can send the relevant documents, questionnaire and the proposals as a word doc or presentation whichever convenient to the mail id socialnetworking@sib.co.in

The Bank expects that the bidder will be up to date on the knowledge of banking products and changing technology. The Bank expects a proactive approach from its vendor who probes to make activities get done fast. The bank has its own process for sanctions and approvals which the vendor should probe and learn. Hence, both product & process knowledge is a must.

The date for the meeting shall be informed.

Communication Details

For any queries, the contact details are given below:

Contact Point: Seethalakshmi H

Contact No: 9526516240

Email id: socialnetworking@sib.co.in

Bank Address : The South Indian Bank Ltd

Marketing Department, 1st Floor,

SIB Building, Market Road, Ekm-682035

