

Request for Proposal

Bank website redesign and development

Éditeur

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1 Introduction

1.1 About Bank

Currently, BANK is the market leader contributing over 30% to the industry's outstanding portfolio. BANK has a network of 43 branches. The bank offers a range of services including savings, loans and commercial banking services. Loans for agriculture and incremental housing are coupled with free advisory services.

1.2 RFP Objectives

Our official website is increasingly becoming a primary communication vehicle to existing and prospective clients, shareholders, job applicants, staff, and the general public. The purpose of this RFP is to invite proposals from experienced website development agencies/firms for re-designing/developing the Bank website to help fuel business growth and align with online user-experience goals and expectations. The selected vendor shall be expected to plan, design, develop, host and maintain a dynamic, engaging and secure corporate website in line with the bank's policies. The new website will replace the existing one that no longer reflects the state of our bank, is not generating sufficient revenue to cover the associated costs, and requires technical resources to make basic changes. This project includes delivery of a modern, user-friendly, plain language website that is accessible to a broad range of stakeholders, partners and other interested parties. It will also include any technical requirements that will need to be considered.

We are seeking a vendor who has demonstrated experience in executing website projects and expertise utilizing best practices for website design, development and deployment. In addition, the vendor should either provide development resources or have established relationships with other vendors who can implement and deploy the strategy and design.

The bank's website redesign objectives shall include but are not limited to:

- Increase audience engagement and reach significantly through a clean, elegant, user-centric design in an BANK-branded online environment

- Create an internet-banking window that is easily accessible through desktop/laptop, tablet, or other mobile devices.
- Attract and qualify leads for our sales pipeline
- Improve access of bank information and content via external search engine optimization
- Measure the ROI of our website efforts

Our vision for the new website includes, but is not limited to, being:

1. Visitor Focused: The new website should be user-friendly, a strong partner to the on-site experience, and effective in attracting new visitors.
2. Easy to Update: Reduce bottlenecks to regular publishing of content by making updates to content on the website simple. We want the website to be easily maintainable, scalable and managed in-house.
3. Modern: Leverage modern design standards, functionality and ensure usability across mobile platforms. BANK's brand image, personality, and voice must remain consistent.
4. Measureable: In order to improve our visitors' experience, we need the ability to measure more aspects of the online user experience.
5. Flexible: We want our website to integrate with systems as they are updated.

1.3 Business Goals for Website

Our business goals for customer acquisition include:

- Increase website traffic by 50% in the next 12 months
- Increase website lead generation from an average of 5 leads per month to 20 leads per month
- Improve our search engine rankings for topics that our audience frequently searches

Our business goals for customer delight include:

- Provide easy access to online banking, loan payments, and financial education resources
- Increase customer communication to weekly touch points that meet our customers at their preferred communication channel.

1.4 Target Audience

While our website will have many different types of visitors, the primary audience the website should focus on includes:

1. BANK employees
2. Existing clients/returning customers – borrowers and depositors
3. Small business/SME owners/Corporates
4. Salaried individuals – govt. employees, NGO staff, foreign missions staff
5. Bankable women
6. Banking regulators, key decision makers, government partners and policy makers
7. Shareholders – current and potential
8. Job seekers/prospective employees
9. The media including members of local and international press

We would like our audience to engage with our website in the following ways:

- Use the website as an information source to help them in their business or personal financial goals
- Download our resources and attend webinars that we host
- Give us contact information over time so we can build a profile on our personas and reach out to them later to open conversations
- Share our content with their networks so we can reach new prospects by referral

1.5 Current Marketing Efforts

Our current marketing efforts include the following:

- Community Sponsorships
- Social Media (Facebook, Youtube, Twitter)

1.6 Reasons for change

Our current website is not supporting our needs at this time. It was created 4 years ago and we have evolved since then. The issues with our current website and the reasons we are looking for change include:

- Our current website is built on Joomla/Drupal/etc. which is not easy for our marketing team to use. We have to ask IT for help with basic tasks and we would like a more robust CMS that gives us more control over content and marketing campaign
- Our current website is not responsive and therefore does not deliver a comfortable experience on mobile devices
- Our current website was built with a “brochure” mindset, but today we are engaging in inbound marketing activities and we would like a set of web tools that supports more assertive marketing tactics like landing pages, online forms, blogging, and other inbound marketing tactics
- The design of our current website is dated and does not follow the design trends of today
- The content and structure of our current website is dated and does not reflect the evolution of our strategy over the past few years

2 Scope of Work

Through its new website, BANK aims to deliver new content and functionality that result in a dynamic, engaging, and interactive experience for its online users. While this SoW has been designed to satisfy the objectives of this project, the bank may consider suggestions for different or additional phase details. To meet the objectives specified in section 2 above, the Bidder is expected to perform at least the following specific services:

1. Visual Design, UI and UX
2. Website and CMS Development
3. Project Execution, Project Management, and Quality Management
4. Training and Documentation
5. Content Migration
6. Hosting
7. Maintenance and Support

2.1 Assumptions of Best Practices

Since we are carefully selecting only the best agencies to talk to, we are fully expecting that best practices will be followed as we create our new website. However, to ensure that our expectations are clear we would like to communicate the following assumptions as we select a vendor:

- We expect that our new website will be fully-responsive so that our website visitor enjoy a great experience on any device, including smart phones and tablets.
- We expect that our new website will be built to render properly on all major web browsers up to two versions back.

- We would like our website to be accessible to users with disabilities and we would like to be structured to follow ADA guidelines.
- We would expect our website go undergo a code review and internal quality assurance process by the vendor before delivery and launch to ensure that errors are minimized.
- We expect that our vendor will have a proven project management process in place.
- While we understand that a large part of SEO is a factor of content strategy and not necessarily website structure, we do expect that our website will be built to be search engine friendly and ready to be properly indexed.
- We expect that our vendor will use 301 redirects to help us avoid losing too much traffic from already-indexed pages.
- We expect the vendor to collaborate with our third-party platforms to ensure a seamless user experience.

2.2 Examples of Websites we admire

Though we want our new website to be unique and bold, our team has been drawn to the following websites as examples that we admire:

- <https://mabanque.bnpparibas/>
- <https://societegenerale.fr/>

2.3 Desired Functionality and Website Tools

As we have identified our business goals and personas and determined how we would like our audience to engage with our new website, we have identified the following uses cases for functionality on our website:

- Online banking: it is necessary to seamlessly integrate with our third-party online banking system.
- Blog: we would like a blog on our website that allow us to publish articles on a regular basis to educate our users and build more traffic to our website.
- Landing pages: we would like the ability to create landing pages to capture leads and offer downloadable resources.
- Pillar pages: we would like to provide our users in-depth resource pages containing financial wellness information and to help with our SEO.
- Website search: we would like our users to be able easily search for the content their looking for via a website search bar.
- Email marketing integration: we would like to capture emails via the website to subscribe to our newsletter.
- Online forms: we would our website to allow us to build online forms without the need for programming knowledge. We would like these forms to be secure (behind SSL) as needed.
- Workflow: we would like a workflow process so that certain team members can edit content and then submit it for approval by a manager or supervisor before it goes live on the website.
- Navigation control: we would like the ability to add and remove web pages as well as control our website navigation through the Content Management System.
- Financial calculators: we would like to build calculators to offer as a resource alongside our financial wellness education. We are open to utilizing third-party systems.
- Membership Eligibility Finder: an eligibility finder is an interactive tool that helps users determine if they are qualified to join.

- Testimonials & Success Stories: Bank want to add testimonials (short statements about a positive experience), or success stories (which tend to be longer, more detailed accounts) to our websites to add depth to the overall experience.
- Locations Finder & Management Tools: A locations management tool within a content management system provides a central repository for all branch location details, making ongoing maintenance much simpler. For visitors, this information can be displayed visually on a map using pin markers. Users can filter and search for nearby branches based on their location, as well as get directions, making it easier to visit one our bank offices.
- Social Media Integration: Banks often run interactive contests, offer special promotions, share financial tips and more to engage audiences on social media. Displaying that kind of content is a great way to encourage interaction with our website and brand as a whole
- Community Information:
- Quick Links: Commonly found in website mega menus and footers, quick links surface popular website pages such as online applications, helpful tools, useful resources, rates and more. Providing visitors with immediate access to these utilities, quick links are valuable for visitors
- Lifestage Financial Solutions: our visitors should select their life stage or financial need so that they can view recommendations for products, calculators, tools, tips, articles and more.
- Comparison Charts & Product Finders: we wants give our visitors a form of visual shorthand with at-a-glance formats that highlight important features and notable product differences, making it easier to make a decision.
- Financial Education Content: Covering topics from home buying to personal finance, educational content is extremely valuable to our visitors. Articles should also contain keywords and phrases that can help drive search traffic at various stages in the consumer journey.

2.4 Required Third-party Integrations

Along with the functional areas described previously, we would like the website to integrate with the following (but not limited to) third-party tools already in use (or planned) by our organization:

- Salesforce: when a web form is submitted on our website, we would like the contact information and form data to flow into Salesforce so that our sales team can start analyzing the lead.
- Eventbrite: we would like to embed Eventbrite events on our website to allow people to register for events.
- Live Chat: we would like to integrate live chat on our website so that our website visitors can get real-time help as they view our content.
- Live Channel:
- Mailchimp: we would like users to be able to subscribe to our email marketing channel.

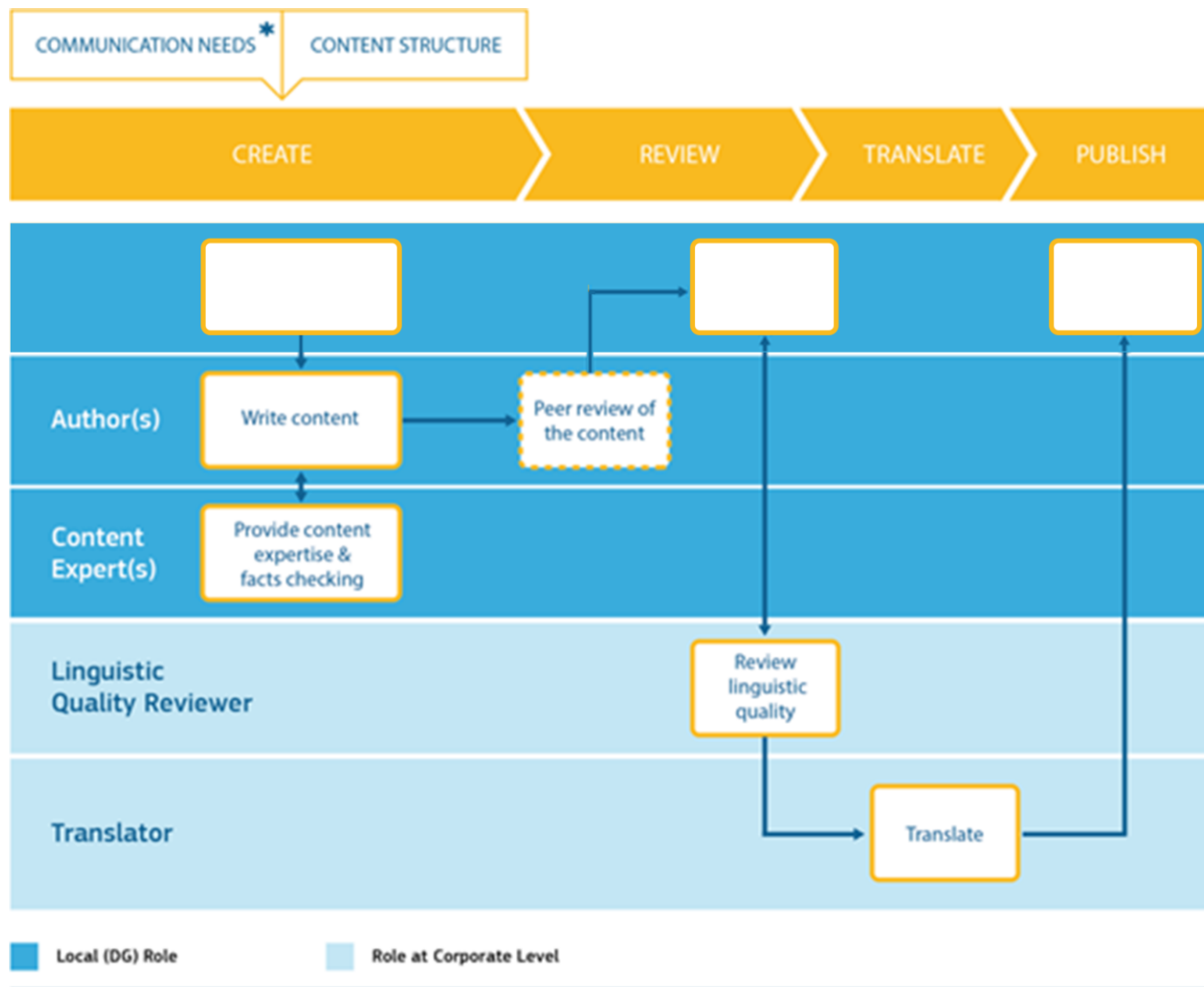
2.5 How our team will Use the website

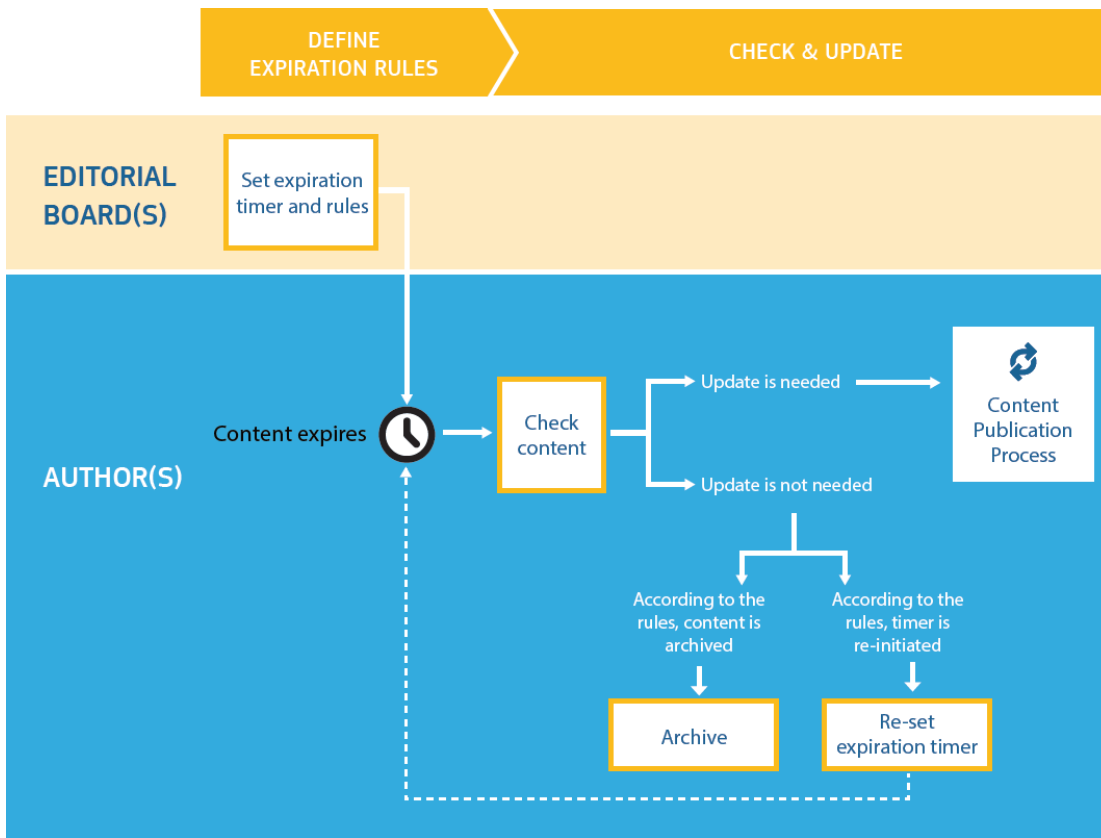
The following use cases describe how our team anticipates using the new website.



Communication needs can be identified by the Editorial Board, the content manager, experts, authors, triggered by the Political site managers or the central analysis team. In any case, communication needs are always based both on user needs and on organisational goals.

Note: every review, check and validation in the process flow implies the content may be sent back to the previous role for modification.





2.6 Ongoing Marketing Support

After the website is complete, we understand that it must be used as marketing tool if we want it to be successful. While we plan to handle marketing in-house at this time, we are open to considering help from a vendor.

As part of the website project, we would like to hire our vendor to create a digital marketing plan that will give us a 12-month roadmap that we can use to reach our goals and including tactics like SEO, social media, content, and email. As we launch the website, we would like to have a plan to go with it that includes options for us doing everything in-house and also options for partnering with our vendor. This consulting should be quoted as an option in the agreement.

2.7 Content Management System (CMS)

We would like our website to be built on an easy to use, reliable CMS that allows us to focus on content and marketing without worrying about technical issues. We are not tied to one specific CMS but we do have the following needs from a CMS:

- Should be user-friendly to the point that anyone can learn to use it (even non-technical people)
- Should have the flexibility to allow the implementation of directories, online databases, and other ways of displaying content that goes beyond a simple “web page”.
- Should allow complete control over website navigation.
- Security should be a focus of the CMS. We would like a CMS that has a proven track record for security, 2-step verification and/or allows IP address login restriction, and has a process for addressing any intrusions or security issues.
- Multi-user access levels. We would like to be able to provide fine-tuned access levels to different users. For example, we would like to be able to provide certain users limited access to certain areas of the site while providing other users complete access. We would also like to be able to restrict certain users to “read only” access or restrict other functions.
- Responsive admin portal. We would like a CMS that has a fully-responsive administrative interface so that we can (as needed) manage the website through tablets and smart phones.
- We would like a CMS that is cloud-hosted and maintained for us. We would our vendor partner or the CMS provider to provide all upgrades, maintenance releases, and patches as part of our agreement.
- We would like our vendor partner to provide unlimited support and training for our team so that any time we need help using the CMS we can call/email and get training.
- We would like a CMS that is being updated and improve on a continuous basis. Though we are approaching this project with optimism and a long-term partnership in mind, we would like to work with a CMS that has an established vendor support ecosystem so that we are not locked into one vendor. If we decide to part ways we want to be able to find another vendor that supports

the CMS that our website is hosted on. We would like the CMS to be hosted on a PCI-compliant platform for security.

3 Requirement compliance matrix

The following sub-sections act as detailed reference of the requirements of our desired website.

Please answer how you meet the following capabilities. The proof-of-concept, vendor product demonstration, and client trial evaluation will also form a part of the selection for the Web CMS. If a feature needs to be developed, please state the expected date it will become available.

For Bidder Response please fill out:

1. Functionality not provided
2. Out-of-the-box
3. Custom implementation

3.1 Website Design Requirements

Requirement Identifier	Requirement	Vendor Compliance / Comments
REQ 1	The primary website will be in English along with a Dari version of the same website.	
REQ 2	Website should be implemented using responsive design technique and allow users to interact with the website both on desktop and mobile versions (smartphone, tablet).	
REQ 3	The redesigned website should reflect BANK's objectives, while offering an easy-to-use user interface.	

REQ 4	Website structure and logical reflection of information should be optimized for different platforms (browsers, search engine bots, etc.) and devices: desktop, mobile, tablets and so on.	
REQ 5	The front page of the website should be clear and understandable, should reflect the most recent information.	
REQ 6	Fast-loading pages – The website must be designed with a balance of text and graphics so that the average page loads in an acceptable amount of time on the average computer.	
REQ 7	Future flexibility – The site should include a flexible design template that can easily accommodate the addition of new functionality later on.	

3.2 Functional Requirements

Requirement Identifier	Requirement	Vendor Compliance / Comments
REQ 8	Exist on a popular and well supported platform.	
REQ 9	Allow for integration with third-party applications; especially for Internet Banking.	
REQ 10	Provide robust analytics and behavior tracking features.	

3.3 Non-Functional Requirements

Requirement Identifier	Requirement	Vendor Compliance / Comments
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REQ 11	<p>Search Engine Optimization</p> <p>The site's public content must be optimized for search engines. Search Engine Optimization must be applied for all onsite optimizations including but not limited to, meta tags, site's structure, semantic tags, XML sitemap, site's verification, Open Graph tags, friendly and readable URL structure, page titles, alt and title attributes, preventing duplicate content, and RDF.</p>	
REQ 12	<p>Compatibility</p> <p>The site must be accessible and useable with current versions of commonly used browsers including but not limited to, IE8+, Google Chrome, Safari, Opera, and Firefox, across most widely used operating environments.</p>	
REQ 13	<p>Site Performance</p> <p>The site must be optimized for performance with minimal page load times. Caching mechanisms must be applied for both logged in users and anonymous users to optimize Drupal's performance. Site must pass Google Page Speed tests. Site's performance tuning must be applied both server-side, and client-side.</p>	
REQ 14	<p>Security</p> <p>The site must be tuned for strict security measures. Including all prevention mechanisms for OWASP Top 10 list.</p> <p>Password policies must be applied, CAPTCHA on all forms, with admin audit trail log to identify and trace back suspicious activity.</p> <p>Security monitoring must be provided at all times. The site must force SSL for logged in users.</p>	
REQ 15	<p>Accessibility</p> <p>The site must be in compliance with WCAG 2.0 Level AA and ATAG 2.0. Logical navigation with proper semantic tags must be applied.</p>	
REQ 16	<p>Integrations</p> <p>The site must be architected for easy integrations with third-party services through standard REST APIs; especially for Internet Banking</p>	
REQ 17	<p>Analytics</p> <p>The site must be integrated with third-party analytics, at the minimum, Google Analytics.</p>	



3.4 Content Management Software (CMS) Requirements

Requirement Identifier	Requirement	Vendor Compliance / Comments
AUTHORING & CONTENT ADMINISTRATION		
REQ 18	Support for content editing including in-line (WYSIWYG editing), Microsoft Word cut-and-paste, and support for rich text.	
REQ 19	Automatic and preconfigured revision control on all content types	
REQ 20	Compare revisions and changes side by side and revert content back to an already revision	
REQ 21	Keep content as unpublished/published	
REQ 22	The system should have an archive utility to search content that published/unpublished, filter by type, author, date, category ...etc. The system should allow for bulk operations on the content. Ability to search any content post stored in the CMS through simple and advanced search.	
REQ 23	System’s WYSIWYG editor should have spell check for both English and French.	
MEDIA & FILES MANAGEMENT		
REQ 24	The ability to insert images in different sizes, with auto resizing of images to achieve design consistency and performance optimization. Ability to specify sizes dynamically for future expandability.	
REQ 25	Provide a media library to re-use media (Images, Videos, Audio, Documents) and any media component.	
REQ 26	Embed media components in WYSIWYG or any page as a block.	
REQ 27	Ability to embed and insert maps, or videos from any external location.	



REQ 28	New image styles are applied for mobile and smaller devices	
REQ 29	Ability to upload files that are downloadable/viewable by logged in users only	
MULTILINGUAL / LOCALIZATION		
REQ 30	The system must support adding languages, and specifying configuration options per language. Example (date formats, currencies, week days)	
REQ 31	The system must provide a translation interface to allow site’s admins to translate new text sentences and messages.	
REQ 32	The system must provide a content translation mechanism to link content translations and synchronize non-translatable data in translated content pairs.	
SEARCH ENGINE		
REQ 33	CMS should provide a powerful search engine that indexes sites content and allows visitors to search by keyword.	
REQ 34	Search engine should provide filtering mechanism and sorting by relevancy, date or other options.	
DELIVERY		
REQ 35	Managing content featuring and order to be featured on homepage and other landing pages via “Content Queue”	
REQ 36	Change the layout of a page from within predefined templates	
REQ 37	Drag-and-drop page components to reorder or structure the page	
REQ 38	Re-use components or blocks across all pages	
REQ 39	Create and re-use custom HTML widgets	
REQ 40	The system should detect broken links can be found and repaired.	
SOCIAL		
REQ 41	The CMS must integrate with popular social networks for sharing content. Each content can be shared in with relevant information (image, title description) on social media networks such as (Facebook, Twitter, LinkedIn, Google+ ...etc.)	



REQ 42	The system must provide sharing stats through integration with analytics tools.	
SCALABILITY		
REQ 43	The system must be developed and architect in a scalable approach. The platform will be expanded with numerous functional features and new services.	

3.5 Hosting Requirements

Requirement Identifier	Requirement	Vendor Compliance / Comments
REQ 44	Provide all necessary services for the hosting of the new website on cloud hosting platform. Hosting must be optimized for fast performance and navigation.	
REQ 45	Hosting must provide a staging site (for testing before making any change on production)	
REQ 46	Service Level Agreement with stated availability of at least 99.95%.	
REQ 47	Daily backups to allow for full system recovery.	
REQ 48	Full system recovery when necessary or as and when requested by BANK without unnecessary delay.	
REQ 49	Guaranteed retrieval of content by BANK at no extra cost after the expiry of the hosting term.	
REQ 50	The site must be hosted using SSL for logged in users.	



3.6 Maintenance and Support Requirements

Requirement Identifier	Requirement	Vendor Compliance / Comments
REQ 51	The term of the maintenance shall be for 12 months starting from the date of launching the new site.	
REQ 52	Provide an online ticket management system accessible online. The Bidder must Provide a phone support access during Cameroon work hours. (8 am to 5 pm Cameroon Standard Time)	
REQ 53	Install security updates, provide bug fixes, CMS upgrades, and ensure the compatibility of the new website with new browser versions.	
REQ 54	Provide Service Level Agreement (SLA) for response times with maximum 1 hour for critical issues.	
REQ 55	Provide 24/7/365 proactive monitoring services for site's performance, server and hosting health. Monitoring services must alert in case of any event/incident and shall be treated according to the SLA provided.	
REQ 56	Logs Retention: All logs (access, error, warning etc.) must be kept through logs retention systems for up to 90 days.	

3.7 Training and Documentation Requirements

Requirement Identifier	Requirement	Vendor Compliance / Comments
REQ 57	The Bidder must provide user-training prior to launch to a selected group of non-technical users who will administer the online platform and CMS, as part of a "train-the-trainer approach". Such training is to be provided with the aim of allowing such users to administer the system with minimal involvement from the Bidder.	



REQ 58	The Bidder must provide a training plan, with user manuals for administrators to administer online platform and CMS. Training manuals must be in English language and cover all aspects related to managing the site.	
REQ 59	After training, the Bidder must provide support on need basis through the Maintenance and Support SLA.	