

REQUEST FOR PROPOSAL

For

Brand Strategy & Creative Agency



Issue Date : 07-Jan-2019

Last Date for submission of proposal : 30-Jan-2019

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1.1 INTRODUCTION AND SCOPE

Canara HSBC Oriental Bank of Commerce Life Insurance Company Limited (“Company”) is carrying on life insurance business in India. As part of supporting its Marketing and Brand promotion, the Company is looking to engage service providers for Brand Strategy & Creative Agency for which this RFP is being issued.

1.2 Purpose

The purpose of this RFP is to inform potential Bidders of a business opportunity and to solicit proposals for Brand Strategy & Creative Agency as per requirements of the Company. Based upon the review and evaluation of proposals offered in response to this RFP, Company may at its sole discretion negotiate and enter into contracts with one or more successful Bidders. As such there will be no volume commitment for the services to be delivered under this RFP by the shortlisted bidder.

Notwithstanding any other provision herein, Bidder participation in this process is voluntary and at Bidder's sole discretion. Company reserves the right to accept or reject any or all bids from a specific or multiple Bidders for any reason at any time. Company also reserves the right at its sole discretion to select or reject any or all Bidder(s) in this process and will not be responsible for any direct or indirect costs incurred by the Bidders in this process.

1.3 Request for Proposal Definitions

Throughout this Request for Proposal, the following definitions are used:

- “Bidder” means a company incorporated under the Companies Act 1956, or a partnership firm (or such other entities or body of individuals/association) that submits, or intends to submit, a proposal in response to this “Request for Proposal”;
- “Service Provider” means the Bidder(s) awarded a Contract resulting from this RFP;
- “Contract” means the agreement formed between the Company and the successful bidder as evidenced by an Agreement issued to the Company;
- “Contract Documents” means the Agreement, the Bidders proposal document, the RFP and such other documents as listed in the Agreement, including all amendments or addenda agreed between the parties;
- “Must”, “mandatory” or “required” means an absolute minimum function or capacity, which, if not satisfied in the proposal, may result in disqualification in the final evaluation;
- “RFP” means this request for proposal including any amendments, attachments, and/or clarifications pertaining to this RFP that may be issued prior to the closing date; and,
- “Should”, “may” or “is desirable” means desirable but not mandatory functions or capacities. Bidders who are able to provide these functions or capacities may be evaluated more favorably than those who cannot. However the final decision shall rest with the company.

2.1 Terms of the RFP

2.2 Acknowledgement

Company is releasing this RFP for Brand Strategy & Creative Agency online on its website (www.canarahsbclife.com) and on e-procurement website (www.canarahsbclife.abcpurchase.com) with the sole aim of making the process free, fair & transparent and user friendly.

The Bid (as per formats) duly sealed and super scribed "Response to RFP – Brand Strategy & Creative Agency " should be addressed to **Shaikh Qutubuddin, Canara HSBC Oriental Bank of Commerce Life Insurance Company Ltd, 2nd Floor, Orchid Business Park, Sector-48, Sohna Road, Gurgaon - 122018, Haryana (INDIA).**

Please note that the Technical and Commercial bid has to be in separate sealed envelopes duly marked as **Technical Bid and Commercial Bid** respectively. Company is not responsible for non-receipt of quotations by the specified date and time due to any reason including holidays. All questions / clarifications should be communicated only on email id kamal.luthra@canarahsbclife.in marking a copy to shaikh.qutub@canarahsbclife.in and procurement@canarahsbclife.in. Quotations received after the stipulated time or the Due date or incomplete in any respect are liable to be rejected without any prior notice.

Kindly note below the complete details of our organization

Name	- Canara HSBC Oriental Bank of Commerce Life Insurance Co. Ltd.
Regd. off. address	- 208, 2nd Floor, Kanchenjunga Building, 18 Barakhamba Road New Delhi - 110001
Corporate Identity no.-	U66010DL2007PLC248825
Telephone no.	- +91 0124 4535500
Fax no.	- +91 0124 4535999
E-mail	- customerservice@canarahsbclife.in
Website address	- www.canarahsbclife.com

2.3 Proposal Deadlines

Pre-bid meeting: A pre-bid meeting to give any clarifications will be held at the Company's office on **17-Jan-19 (3PM- 4PM)**. Bidders are welcome to attend the meeting at our **Gurgaon** office and ask their questions in an open forum at the appointed time and venue. Preferably Bidders should send all their queries/clarifications 2 days in advance and confirm participation on pre bid meeting 1 day in advance. All queries and their answers will be put on the Company's website and will be part of this bid document.

Bid Submission: Company must receive duly completed and signed proposals in the manner prescribed not later than **30-Jan-19**.

2.4 Company's Obligations

The submission and receipt of proposals does not obligate the Company in any way to commit to any Bidder(s). The Company shall not be liable for any costs incurred by Bidders in the preparation, presentation or any other aspect of the proposals received by reason of this request, nor is Company obligated to negotiate separately with any sources whatsoever in any manner necessary to serve Bidder's best interests. Company makes no representation, implied or express, that it will accept and approve any proposal submitted. Any and all Contracts which result from this RFP shall be non-exclusive, non-commitment, as-ordered agreements. Company shall not have any liability to bidders for any interruption or delay in access to the website to obtain the RFP document/details irrespective of the cause. Company will also not be responsible for any damages, including damages that result from, but are not limited to negligence. Also Company will not be held responsible for consequential damages, including but not limited to systems problems, inability to use the system, loss of electronic information etc.

2.5 Proposal Evaluation

Proposals submitted may be reviewed and evaluated by any person at the discretion of Company's internal evaluation team, including non-allied and independent consultants retained by Company now or in the future for the sole purpose of obtaining evaluations to proposals.

The Company may, at its sole discretion, negotiate and enter into contracts with one or more successful Bidders for the said services.

Bidders may be asked to further explain or clarify areas of their proposal in writing during the evaluation process.

The evaluation will be done in two stages:-

Stage 1: - Stage 1 consists of two parts as follows:

- i) Technical Evaluation - Technical evaluation for the proposed solution via documentation provided. Post technical evaluation, only shortlisted bidders may be called for detailed presentation.
- ii) Presentation – Detailed Presentation from the services (presentation should include case studies, work samples, company credentials, competition benchmarking, proposed service solution, proposed methodology etc.).

Stage 2: - Commercial evaluation of the bid - Technically shortlisted bidders (Stage-1) will be considered on the commercial evaluation.

The only information regarding status of the evaluation of proposals that the team will give to any inquiring Bidder shall be whether or not that Bidder has been awarded a Contract. The Company may, at its sole discretion, inform any inquiring Bidder of the reason(s) why it was not awarded the bid.

The Company reserves the right to conduct a reverse e-auction after the completion of the RFP process, the schedule of which will be intimated later to all the pre-qualified bidders. All Bidders must confirm if they are

willing to participate in the reverse auction and if they have necessary digital signatures required for the purpose.

2.6 RFP Terms and Conditions Applied to Final Contract

The terms and conditions of the RFP, including the specifications and the completed proposal, will become, at Company's sole discretion, part of the final Contract (the "Contract") between Company and the selected Bidder. In the event that responses to the terms and conditions will materially impair a Bidder's ability to respond to the RFP, Bidder should notify Company in writing of the impairment. If Bidder fails to object to any condition incorporated herein, it shall mean that Bidder agrees with, and will comply with the conditions set forth herein.

Any exceptions to the terms and conditions or any additions, which Bidder may wish to include in the RFP, should be made in writing and included in the form of an attachment to the applicable Section in the RFP.

2.7 Terms Binding on Bidder

Following the date for submission of proposals, and prior to Contract award, the RFP shall be binding upon Bidder in all respects for a period of 180 days.

2.8 Hold Harmless

In submitting a proposal, Bidder understands that Company will determine at its sole discretion which proposal, if any, is accepted. Bidder waives any right to claim damages of any nature whatsoever based on the selection process, final selection, and any communications associated with the selection.

Company reserves the right to award the Contract to the Bidder(s) whose proposal is deemed to be the most advantageous in meeting the specifications of the RFP. In addition, Company reserves the right to add or waive any requirements contained in this RFP at its sole discretion with regard to proposals submitted. Company's decision on award of Contract shall be final and binding on all the Bidders.

Company shall be at liberty to cancel the RFP / reverse auction process at any time, before ordering, without assigning any reason.

2.9 Confidentiality Provision

The terms of this RFP, the information provided by the Company herein and all other information provided by Bidder in connection with the services offered to be provided by the Bidder pursuant to this RFP, are to be treated by Bidder as strictly confidential and proprietary. Such materials are to be used solely for the purpose of responding to this request. Access shall not be granted to third parties except upon prior consent of Company and upon the written agreement of the intended recipient to treat the same as confidential. Company may request at any time that any of Company's material be returned or destroyed.

Should Bidder choose not to respond to this RFP, please return all materials and any duplicates thereof at:

Title: RFP for "Brand Strategy & Creative Agency"
Kind Attn: Shaikh Qutubuddin
Canara HSBC Oriental Bank of Commerce Life Insurance Company Ltd.
2nd Floor, Orchid Business Park,
Sector-48, Gurgaon
Haryana (INDIA) 122018

2.10 Sub-Contracting

The services offered to be undertaken in response to this RFP shall be undertaken to be provided by the Bidder directly employing their employees, and there shall not be any sub-contracting, franchisee, contract to hire, and consultant etc. arrangement done by the Bidder. The deputed person should be only on bidder rolls.

2.11 Acceptance of Proposals

Company reserves the right to modify the terms of the RFP at any time at its sole discretion and the same will be uploaded on the website <http://www.canarahsbclife.com>. The bidders have to remain updated about the same from the website and Company will not be responsible for such information not being downloaded by the bidder. Subsequent to the submission of proposals, interviews and negotiations may be conducted with one or more Bidders, but there will be no obligation to receive further information, whether written or oral, from any Bidder not to disclose the nature of any proposal received.

This RFP should not be construed as an agreement to purchase products or services. Company is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed in accordance with the evaluation criteria.

a) The bidder is required to voluntarily disclose at the time of bidding if any of its sister concerns/group companies/relatives are directly or indirectly participating in this RFP.

b) All quotes to be supported by Copy of Pan Card, Certificate of incorporation, GST registration detail and address proof.

c) Company reserves the right to terminate the Agreement/ Contract in case Service Provider gets blacklisted by any other organization/Department of Government of India or State Governments during the course of supply of material or services, if Service Provider is convicted in a legal/tax evasion case or on account of any other legal misconduct of the Service Provider, unsatisfactory past performance, corrupt or fraudulent practices, any other unethical business practices.

d) The bidder shall disclose if any of the bidder(s) are sister concerns/group companies/associates/affiliate entities or any of such entities employees/directors/shareholders are applying for this RFP/RFP process. Further the Service Provider shall disclose if any of its sister concerns/group companies/associates/affiliate entities or any of such entities employees/directors/shareholders are related to the Company and/or to its employees/directors/shareholders.

e) Please submit the flowing document along with proposal.

Vendor Registration form. Duly filled Service Provider profile form along with the document mentioned above in point no. b

The bidder is required to voluntarily disclose at the time of bidding if any of its sister concerns/group companies/relatives are directly or indirectly participating in this RFP.

Duly filled Non-Disclosure Agreement to be printed on non judicial stamp paper of Rs 100/- and signed. Same should be part of the response document.

2.12 Evaluation and Selection

A committee will evaluate proposals against the mandatory criteria as detailed herein. Proposals meeting all the mandatory criteria will then be assessed and scored against the evaluation criteria. Company's decision on evaluation shall be final and binding on all the bidders. Bidders who qualify the evaluation criteria will be empanelled for services. Commercial bids will be asked from the qualifying bidders post technical evaluation. Any deviations from the skill set / experience / prerequisites/ requirements and/or the terms and conditions of the Tender Document shall be submitted explicitly along with convincing reasons in the format attached (refer Clause 5.1). Company will not provide any justification in case it rejects the deviation and Company reserves all rights to reject or accept any deviation.

In case the Bidder intends to notify any grievance or concerns pertaining to the fairness of the complete process including but not limiting to bid submission or selection of Service Provider then the Bidder may send an e-mail at **whistleblower@canarahsbclife** giving requisite details for seeking any clarification.

2.13 Liability for Errors

While Company has used considerable efforts to ensure an accurate representation of all the details as is required for the proposed services, the information contained in this RFP is supplied only as a guideline for Bidders. The information is not guaranteed or warranted accurate by Company, nor is it necessarily comprehensive or exhaustive.. In the event Company finds that the objectives of the intended outsourcing is better achieved by processes/procedures other than those mentioned in this document, Company shall have the right irrespective of the fact whether it has already received proposals from intending bidders or not, to effect such changes and enter into negotiations with one or more Bidders at its sole discretion for such changed/modified processes.

2.14 Acceptance of Terms

All the terms and conditions of this RFP shall be deemed to be accepted by the Bidder and incorporated in its proposal unless specifically notified otherwise.

2.15 Ownership of Proposals

All documentation, including proposals, submitted to Company will become the property of Company.

2.16 Use of Request for Proposal

This document or any portion thereof, is the property of Company and may not be used or copied for any purpose other than the submission of the Bidder's proposal.

2.16 RFP Schedule

- | | |
|---|--------------------------|
| • Company advertises RFP on its website | 07-Jan-19 |
| • All inquiries/clarifications regarding RFP | 17-Jan-19 |
| • Pre-Bid Meeting | 17-Jan-19 (3 PM) |
| • Bidders' deadline for submitting responses to RFP | 30-Jan-19 |
| • Company informs final selection to bidders | TBD |

2.17 Delay in performance of the obligations by the Bidder

The short listed Bidder(s) must strictly adhere to the schedule, specified in the agreement to be executed between the Company and the Bidder(s) for performance of the obligations arising out of the agreement and any delay will enable Company to resort to any or both of the following:

- i. Time and date stipulated for completion of work is the essence of the contract.
- ii. If any part of the contract is not satisfactorily remedied within reasonable time, Company may proceed to do the work at Bidder's risk and expenses without prejudice to any other contractual rights, which Company may have against Bidder in respect of any such non performance.

3.1 Proposal Preparation

This section defines the proposal preparation and submission procedures, which are to be followed by all Bidders. Bidders are cautioned to carefully read and follow the procedures required by this RFP. Please note that deviations may be cause for rejection of your proposal.

3.2 Proposal Format

As part of the Bid documents, the Bidder shall provide among other details, the following information and shall also adhere to the instructions mentioned below:

- a) Bidder's name and address, Bidder's telephone number, email address and a contact person.
 - b) One page letter of introduction identifying the Bidder and signed by the person or persons authorized to sign and bind the Bidder to statements made in the proposal. The returned RFP will be referenced as an attachment if/when a contractual agreement is executed. This document has to be uploaded and mapped with this corresponding schedule.
 - c) Please follow the format of this RFP, placing answers in the text box immediately after sections requiring responses. Please do not enter any information into any part of this document other than the boxes provided. The boxes will expand to accommodate responses of any length.
-

- d) NO CHANGES TO THE LINES, FORMAT OR STRUCTURE OF ANY SPREADSHEETS IS PERMITTED. CHANGING THE SPREADSHEETS IN ANY WAY, OTHER THAN INSERTING THE REQUIRED INFORMATION, SHALL BE CONSIDERED CAUSE FOR YOUR COMPANY'S DISQUALIFICATION FROM FURTHER ANALYSIS AND PARTICIPATION IN THE RFP PROCESS.
- e) Any additional information, brochures, etc., can be provided at the discretion of the Bidder and should be clearly labeled and uploaded.
- f) Bidders are requested to submit the draft agreement copy along with the RFP response.

3.3 Notification of Changes

All recipients of this RFP will be notified of any changes if any made to this document prior to the due date of submission of proposals.

3.4 Changes to Proposed Wording

The Bidder will not be permitted to change the wording of its proposal after submission to Company. No words or comments will be added to the general conditions or detailed specifications unless requested by Company for the purposes of clarification.

3.5 Bidder's Expenses

Bidders are solely responsible for their own expenses in preparing and submitting a proposal to Company, if any.

3.6 Completeness of Proposal

By submission of a proposal, the Bidder warrants that all components required to manage the program have been identified in the proposal or will be provided by the Company at no charge.

3.7 Sub Contracting

The services offered to be undertaken in response to this RFP shall be undertaken to be provided by the Bidder directly employing their employees, and there shall be no sub-contracting done by the Bidder.

4.1 Scope

Detailed scope shall be as per Annexure-I.

4.2 Business Continuity:

The Service provider shall mandatorily have a Business Continuity strategy in place.

The same will be taken into consideration as part of the Technical Evaluation.

4.3 Information Security:

Information security requirements shall be put in place by the service provider to ensure protection of confidential information of the Company and its policyholders from intentional / inadvertent disclosures to the unauthorized persons.

The Service Provider shall provide details of their Information Security and the same will taken into consideration as part of the Technical Evaluation.

The Service Provider shall be required to comply with information security directives/changes issued by the Company from time to time.

4.4 Fraud:

The Service Provider shall provide details of their Anti-Fraud controls and the same will taken into consideration as part of the Technical Evaluation.

4.5 Criteria

The purpose of this section is for Bidders to provide information to demonstrate to Company that its services offering satisfy Company's requirements.

The bidder should also demonstrate that it has the financial and organizational infrastructure to fulfil the fundamental requirements set out in this RFP. Bidders not meeting them or not demonstrating that they do meet them may not receive further consideration during the evaluation process.

4.6 Minimum Eligibility Criteria

Bidder is expected to provide response specifically to minimum eligibility criteria"s and support the same with necessary documentation, wherever applicable.

- a) Bidder should be a Company incorporated under the Companies Act. 1956.
- b) Bidders must have a valid GST Number & PF Establishment Code issued by the PF Commissioner and other applicable licenses and certificates.

The Bidding organizations must comply with the above mentioned criteria. Non compliance of any of the criteria will entail summary rejection of the offer.

Wherever applicable photocopies of relevant documents / certificates must be submitted as proof in support of the claims made for each of the above mentioned criteria. Company reserves the right to verify / evaluate the claims made by the Bidding Organizations independently.

4.7 Pricing Model

The prices have to be submitted in sealed envelopes as per the format given in **Annexure III**.

5.1 Intent

Please find attached the detail scope of activities proposed to be outsourced, as per Company's current understanding of the processes.

5.2 Deviation Sheet

Deviations from Technical Specifications and Terms and Conditions of the Tender

Sl No	RFP Document Clause	Technical Specification or Terms and Condition in the RFP document	Deviation offered	Reasons and whether deviation adds to the operational efficiency in case of the systems
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Note:

Deviations from any of the terms and conditions of the tender document should be specified

If any deviations from the technical specifications are warranted, reasons for such variations should be specified and if such deviations/ variations add to improvement of the overall performance of the systems, those should be specifically mentioned and supported by relevant technical documentation as specified above.

5.3 Compliance

If there is any deviation reported in managing IT Software & Hardware inventory, 100% software or hardware cost would be charge from the monthly payment.

5.4 Contract

The Contract / Agreement to be signed with the selected bidder(s) shall be as per the format of the Company.

Annexure-I

Scope :

Empanel a agency/Partner that can help create and drive the brand language across all platforms. Someone who qualifies on the below parameters:

Strategic Approach

Ability to challenge the status quo

To partner us on this journey of transformation, we need a partner with proven strategic capability in thinking and driving alignment with multiple stakeholders (banks & corporate agents) and a passion to drive change

Look beyond communications

With intensifying competitive pressure and regulatory & operating challenges, we desire more engagement with the team to solve business issues, not just communication issues. We seek more data driven insights to create informed strategy which are long term

Have an integrated thinking

Key to our transformation agenda from a marketing perspective is to maximize impact on marketing communications with efficiency across all the media platforms including Offline, print, social and digital. Foster integrated thinking, across paid, earned and owned media.

To push beyond creative boundaries

Recognizing the need to stand out purposefully amidst increasing clutter, we are seeking fresh perspective on how the brand should be modernized yet stay connected to the end customer

Optimized ways of working

Key to making this relationship successful would be a more streamlined and collaborative ways of working, with the internal teams and with external agencies required as and when basis.

Audience-led, integrated strategies

Focus on consumers not products in this competitive world. Agility to evolve communications strategy based on changing customer segments and needs would be the key.

Key Work Lines Expectations

Advertising – The ability to create advertising in print and electronic media that reflects an appropriate image of the company. Agency will provide a full range of creative and account management skills and activities and must be familiar with many applications of advertising and design (i.e., commercial production, direct mail, point of purchase, signage, etc.).

Brand Expansion & Development - Assist in the further development and evolution of the brand identity. Agency to assist in the consistency of the brand message throughout all forms of consumer marketing programs. This will involve the following:

- Audit existing brand, sub-brands, and marketing materials
- Conduct research of our primary internal and external audiences.
- Profile and segment research by targeted key audiences (consumers, employees, partner banks & other stakeholders).
- Perform a competitive analysis of peer brands and their positioning
- Evaluate and update our visual identity and tagline
- Develop other essential brand identity elements, including clarity around the branding

Project Deliverables:

- Conduct brands audit/benchmarking: that provides a market research/competitive analysis and establishes the brand positioning.
- Design a Brand Architecture Diagram that identifies the position of each of the sub-brands as they relate to one another and the parent brand
- Design and present at least three (3) iterations of the organization's visual identity and tagline. Visual identity, font/typeface, color palette, tagline on the brand for messaging purposes to be clearly articulated
- Creation of brand personas
- The logo must be effective in color and in black-and-white/grayscale.
- Brand standards guide and governance recommendations to maintain standards.
- Brand strategy that specifies the organization's primary audiences, brand values, personality, value proposition, brand positioning, and brand architecture
- Brand standards for: photographic images, video assets, social media and web banner posts, posters, brochures, signage, postcards, rack cards, thank you cards, website theme, email signature, Power Point, letterhead, email marketing templates, newsletter templates, digital sign templates, wall/building decals.
- Production of templates: photographic images, video assets, social media and web banner posts, posters, brochures, signage, postcards, rack cards, thank you cards, website theme, email signature, Power Point, letterhead, email marketing templates, newsletter templates, digital sign templates, wall/building decals.
- Marketing campaign to launch new brand.

Graphic/Website Design – The ability to articulate the framework for website design keeping in mind the user journey and user experience at different nodes of interactions with the brand. These designs will be required to maintain graphic integrity and continuity with the overall image of the brand.

Market Research – Assist in the development and implementation of various market research programs designed to provide insight into the effectiveness of the advertising and marketing campaigns.

New Initiatives – Agency to advise on appropriate advertising and marketing opportunities that may help communicate the brand message to our targeted audiences. Agency will also provide advice on other related communication, advertising and public relations matters.

Operational Assignments

Marketing & Tactical Communication – Development and Execution of Communications to address tactical issues in select markets using both Above the Line and Below Line Media

Direct marketing conceptualization and implementation – Plan and implement direct marketing initiatives for different customer and trade segments of CHOICE

Marketing activation conceptualization and implementation – Plan and implement activation programs at branches to help achieve sales targets.

Category	Description	Scope (annual)
Mass media campaigns (conception, information architecture, creative design, copywriting, graphical design and resizing, and final mechanicals)	2-3 television campaign during the year	Storyboard, conceptualization & script
		Indicative media planning
	print campaigns (Adaptations included for 10 regional languages)	Storyboard, conceptualization & script
		Indicative media planning
		Creative adaptations
	Internal launch for employees	Event concepts for employee engagement
		Employee communication (email, SMS, script for Sr. management messages)
		Creative support & adaptations
	Complimenting outdoor & Radio campaign	Storyboard, conceptualization & script
		Indicative media planning
		Creative adaptations (<i>not required for Radio</i>)
Product Launches (8 in a year)	Product collaterals	Product taglines & suggested names
		Product brochures (15-20 pages)
		1 page fliers (short version of the brochure)
		Launch communications - emails, Teasers, SMS
	Design, translation in to 10 languages, proof reading, bank level adaptations to various collaterals to be done in coordination with translation agency	Script & concepts for Short AV/Whatsapp AVs (1.5 to 2 minutes)
		Danglers, standees, banners
		Posters
		Script for explanatory video
		Proposal forms
		Web banners
		Product page in the company Website & web brochures

		Key Information Documents, Terms & Conditions, Policy Document (only visual appeal)
		Sales tool (concept)
Branch level activation campaigns (4 in a year)	Conceptualization & designing of collaterals	Flyers
		Customer cards
	Design, translation in to 10 languages, proof reading, bank level adaptations to various collaterals	Feedback form
		Danglers (2 types for each campaign)
		Poster (2 types for each campaign)
		Banners (2 types for each campaign)
		Launch communications - email, Teasers, SMS (3 for each campaign)
Employee Engagement Campaigns (1 per quarter)	Internal communication campaigns	Activities (brief by the company) or suggestions aligned to important festivals or events
		Engagement activities - Ideation, concepts, communication strategy & creation
		Wallpapers, emailers, SMS (3 each per campaign)
		Script & concepts for 1 minute videos (production cost as per actual)
		Posters (2 per campaign)
		Banners (2 per campaign)
		Danglers (2 per campaign)
Calendar & diaries	Once a year	Concept
		Designing, Layout & adaptations to various sizes
Strategic Planning	Brand Strategy	Quarterly Approach
		Brand Performance Alignment
Print & Magazine Ads	As and when required	Concept, Creative & Copy
General	Provide creative consulting, sharing with Client the Agency's best practices expertise for brand advocacy and creative continuity.	Designing, Layout & adaptations to various sizes
	Identify and recommend new strategies to increase brand awareness	
	Participate in weekly Agency account meetings, reviews,	1 per quarter agency meetings for brainstorming
		1 per week (can be via con call or physical meeting – mutual agreement basis)

	requirements sessions, and briefings	
	Develop strategy for ongoing evaluation of brand position and strength	As and when required
	Guidance & ratification in the media plan (from CHOICE's partnered media agency) of the campaigns (inputs & feedback)	Every time for mass media campaign

Pricing Model:

Brand & retainership

The agency to focus on Brand and key line definition of brand strategy and responsible for overall implementation

Agency Pitch Presentation to Include –

1. The company's current brand status, challenges
2. Brand strategy aligned to business performance & category awareness in next 2 years (minimum)
3. Alternate design/approach of logos considering the current challenges
4. Strategic planning attributes and the proposed plan
5. Why the company would partner with you?

Annexure – II (Technical Bid)

Aspect	Parameters	Details to be provided
Company Overview	Areas of practice disciplines i.e. Advertising & marketing, branding, research, media planning, other related services	Names of the practices or discipline
	No. of years operating as a creative & advertising agency in India	Min. Years (20)
	Last 3 years average revenue	Min Financials (100 cr)
	No. of active clients in last three financial years	Absolute value in number (20)
	No. of life insurance or BFSI clients in last three financial years	Absolute value in number (3)
	Active client references (minimum 1 references for each area) - BFSI / Life Insurance, Ecommerce, FMCG, Other than above sectors	Reference against each sector
	No. of offices in India	Absolute value in number (3)
	Agency affiliate network (PAN India)	If Yes, provide details (yes/no)
	Office in Delhi/NCR with presence of senior management	If Yes, provide details (yes/no)
	No. of total employees in office located in Delhi/NCR (from which CHOICE account will be served)	Absolute value in number
	Industry recognition received in last 3 years	Provide details (yes/no)
	Any other value added services offered	Provide details
	Past work references	Provide references & details
Creative Experience & Quality in banking or life insurance sector	Life Insurance Product Launch	Sample of Product collaterals (for at least 3 products) Product launch communication and creative
	Branch level activation campaigns in a bank or life insurance company	Example of a campaign executed
	Print campaign	Example of a campaign executed
	Radio or TV campaign	Example of a campaign executed
	Outdoor campaign	Example of a campaign executed
	Employee Engagement	Example of a Internal communication campaigns
	Newsletters	Example (at least 2) of a campaign executed
	Magazine Ads	Example of a campaign executed

Operational Support for clients	SLA & TAT Management	Illustrate the TAT & SLA management process and it's related controls
	Management & Creative Team	Exact count and profile for creative and management team at the location. Complete JDs and resumes of proposed team for the account.
Second level of screening		
F2F presentation for the proposed approach	Proposed strategy (quality, logical reasoning & engagement levels)	
	Methodology (research, brand creation, execution)	
	Objectives (desired outcome) from Brand CHOICE Life	
	Relevance to CHOICE & partner banks	

Annexure – III (Commercial Bid)

Company Name :
Contact Person :
Email ID :
Contact No :

S. No	Description	Amount - Rs
1	Monthly retainership	
2	Any other cost	
	Total	

- Taxes will be extra
Please mention tax percentage

ANNEXURE-IV

For vendor registration document please send your request to shaikh.qutub@canarahsbclife.in

Bidders are requested to share the draft of agreement along with RFP response

ANNEXURE-V

(To be printed on stamp paper)

NON DISCLOSURE AGREEMENT

THIS Non Disclosure Agreement (this "**Agreement**") is made on day of 201_ ("Effective Date"), by and between:

Canara HSBC Oriental Bank of Commerce Life Insurance Company Limited, a company incorporated under the Companies Act, 1956 having its registered office at Unit No. 208, 2nd Floor, Kanchenjunga Building, 18 Barakhamba Road, New Delhi - 110001, India and corporate office at 2nd Floor, Orchid Business Park, Sector-48, Sohna Road, Gurgaon 122018, Haryana (hereinafter referred to as the '**Company**' which expression shall, unless it be repugnant to the context or meaning thereof, be deemed to mean and include their respective subsidiaries, affiliates, successors and permitted assigns and affiliates) of the ONE PART, AND

_____ a company incorporated under the Companies Act, 1956 having its registered office at

_____ (hereinafter referred to as the '**Service Provider**' which expression shall, unless it be repugnant to the context or meaning thereof, be deemed to mean and include their respective subsidiaries, affiliates, successors and permitted assigns and affiliates) of the OTHER PART

(The Company and the Service Provider (jointly and severally) hereinafter are referred to as '**Parties**' collectively and '**Party**' individually).

WHEREAS

(i) The Parties are, or will be, evaluating, discussing and negotiating a potential contractual relationship concerning the _____ (the '**Project**').

(ii) The Parties may, in these evaluations, discussions and negotiations, disclose to each other information that is technically and /or commercially confidential.

"Confidential Information" means (a) any information disclosed by either Party to the other Party, either directly or indirectly, in writing, orally, electronically, other media format, and/or in tangible objects, including, without limitation, algorithms, mask works, business plans, customer data, customer lists, customer names, financial analysis, forecasts, formulas, hardware configuration information, know-how, ideas, designs, discoveries, market information, marketing plans, processes, products, product plans, research, specifications, software, source code, trade secrets or any other information whether designated as "confidential," "proprietary" or not or any third Party information that the disclosing Party has an obligation of confidentiality to protect (collectively, the "Disclosed Materials") and (b) any information otherwise obtained, directly or indirectly, by a receiving Party through inspection, review or analysis of the Disclosed Materials. Information disclosed orally shall be considered Confidential Information only if such information is stated as such at the time of disclosure and is confirmed in writing as being Confidential Information within thirty (30) days after the initial disclosure.

Exceptions: Confidential Information shall not, however, include any information that (i) is available in the public domain; or (ii) is independently developed by the receiving Party without use of or reference to the disclosing Party's Confidential Information, as shown by documents and other competent evidence in the receiving Party's possession; or (iii) is required to be disclosed by the receiving Party by order of a court, administrative agency or governmental body, or by any law, rule, regulation, subpoena, or any other administrative or legal process.

Non-use and Non-disclosure: Each Party agrees not to use, directly or indirectly, in whole or in part, any Confidential Information of the other Party other than for the purposes of the Project and as specifically provided for in this Agreement. Receiving Party may disclose the other Party's Confidential Information to employees of the receiving Party on a need to know basis. If a receiving Party is required by law to make any disclosure that is prohibited or otherwise constrained by this Agreement, the receiving Party will provide the disclosing Party with prompt written notice of such requirement so that the disclosing Party may seek a protective order or other appropriate relief. Subject to the foregoing sentence, such receiving Party may furnish that portion (and only that portion) of the Confidential Information that the receiving Party is legally compelled or is otherwise legally required to disclose; provided, that the receiving Party provides such assistance as the disclosing Party may reasonably request in obtaining such order or other relief.

Maintenance of Confidentiality: Each Party agrees that it shall take reasonable measures to protect the secrecy of and avoid disclosure and unauthorized use of the Confidential Information of the other Party. Each Party shall ensure that its employees who have access to the other Party's Confidential Information are legally obligated not to disclose such Confidential Information, prior to any disclosure of Confidential Information to such employees. No Party shall make any copies of the other Party's Confidential Information except upon the other Party's prior written approval. A Party receiving Confidential Information shall promptly notify the Party disclosing such Confidential Information of any use or disclosure of such Confidential Information in violation of this Agreement of which the receiving Party becomes aware. The Parties shall at all times have systems in place having adequate security measures required for the protection of the Confidential Information from leakage or unauthorized usage.

Return of Materials: All documents, data and other tangible objects (in whatever media or format) containing or representing Confidential Information that have been disclosed by either Party to the other Party, and all copies or extracts thereof that are in the possession of the other Party, shall be and remain the property of the disclosing Party and shall be promptly returned to the disclosing Party upon the disclosing Party's written request and on expiry or termination of this Agreement.

No License, Testing or Publicity: Nothing in this Agreement is intended to grant any rights to either Party under any discovery, disclosed invention, patent, mask work right, copyright, trade secret, trademark or service mark, or other intellectual property right of the other Party, nor shall this Agreement grant any Party any rights in or to the other Party's Confidential Information. Nothing herein grants any rights whatsoever to the Parties to test, disassemble, decompile, reverse engineer, replicate, or otherwise copy any of the Confidential Information or a Party's intellectual property. No Party shall use or cause to be published in any kind of media or communication the name, logo or other identifying information of any of the Parties to this Agreement without the prior expressed written consent of the specific Party.

Term: The Agreement shall be valid until its expiry or termination as per the below terms:

The obligations of each receiving Party under this Agreement shall survive until such time as all Confidential Information of the other Party disclosed hereunder becomes publicly known and made generally available through no action or inaction of the receiving Party.

The Parties shall return all Confidential Information to the disclosing Party on or before the termination of this

Agreement.

- c) The Company may terminate this Agreement by giving 30 (Thirty) days of notice in writing to the Service Provider. Nothing in this Agreement shall obligate either Party to proceed with any transaction between them.

Availability of Equitable Relief: Each Party understands and agrees that its breach or threatened breach of this Agreement will cause irreparable injury to the other Party and that money damages will not provide an adequate remedy for such breach or threatened breach, and both Parties hereby agree that, in the event of such a breach or threatened breach, the non-breaching Party will also be entitled, without the requirement of posting a bond or other security, to equitable relief, including injunctive relief and specific performance. The Parties' rights under this Agreement are cumulative, and a Party's exercise of one right shall not waive the Party's right to assert any other legal remedy. Should any proceeding or litigation be commenced between the Parties hereto concerning the terms of this Agreement, or the rights and duties of the Parties hereto, the prevailing Party in such proceeding or litigation shall be entitled, in addition to such other relief as may be granted, to a reasonable sum as and for the prevailing Party's attorneys' fees.

Governing Law and Jurisdiction: This Agreement shall be subject to the laws of India and the Parties agree to the exclusive venue and jurisdiction of the courts situated in New Delhi.

10. **Counterparts and Facsimiles:** The Parties may execute this Agreement in counterparts, each of which is deemed an original, but all of which together constitute one and the same Agreement.
11. **Expenses:** Each of the Parties shall be responsible for its own expenses. Receiving Party shall be completely responsible for its cost and expenses in conducting any evaluations, and reporting the results of an evaluation, unless other specific arrangements are made in writing prior to the expenses being incurred.
12. **Notice:** All notices required or permitted to be given under this Agreement to either Party shall be in writing and delivered to the address set out in the first paragraph of this Agreement or as changed by the Parties by written notice delivered to each other from time to time in accordance with this Agreement. Notice shall be deemed given upon actual receipt.
13. **Miscellaneous:** Nothing in this Agreement shall be construed as creating an agency, partnership, joint venture, or other business relationship or association between the Parties. No provision of this Agreement may be waived except by a writing executed by the Party against whom the waiver is to be effective. A Party's failure to enforce any provision of this Agreement shall neither be construed as a waiver of the provision nor prevent the Party from enforcing any other provision of this Agreement. No provision of this Agreement may be amended or otherwise modified except by a writing signed by the Parties to this Agreement. If any provision of this Agreement is found to be illegal or unenforceable, the other provisions shall remain effective and enforceable to the greatest extent permitted by law.

IN WITNESS WHEREOF, this Agreement was duly executed on behalf of the Parties on the day and year first above written.

By: _____

Name: _____

Title: _____

Witness:

By: _____

Name: _____

Title: _____

Witness