

Modernization of Government Services Project

Project ID No. P148537

Consulting Services to Develop a Structured, Comprehensive, and Integrated Knowledge Base and Define Automation Tools for Government Client Support Service (GCSS)

I. BACKGROUND

Electronic services have transformed the way authorities interact with citizens. The transition to the provision of public services through electronic channels must be applied by government institutions, to benefit from greater efficiency of work processes and to increase citizens' access to quality information and services. At the same time, by reducing human contact for the provision of services, it is necessary to create a contact mechanism for users of public services to offer consultations, the necessary support and receive customer feedback.

The initiative of establishment of the Government Customer Support Service comes to ensure the creation of a single point of contact with public service users, offering support and consultancy services, thus ensuring standardization and, optimization of support processes and as a result, increasing the quality of public services and setting up an effective and operative interaction between the customer and services providers, enhance quality criteria and ensure rapid resolution of incidents.

The Government aims to organize a unified Contact Center for citizens, businesses, and Government to access information on services, support requests and problem-solving, as well as to solicit feedback of female and male citizens, including socially vulnerable groups, on their needs and concerns. The center will also allow providing feedback on services or reporting technical issues with the public services portal, specific e-services, or unified centers for public service provision. This contact center will provide two-way communication with beneficiaries and will be used to solicit citizens' feedback on their experience and perceptions in a transparent and responsive manner. The following benefits are envisaged:

- increasing accessibility to support activities related to the provision of public services.
- reorganization of the model of providing support by public administrative service providers according to the "one stop shop" principle
- ensuring the capabilities of service providers in performing support activities
- ensuring registration and management of all incidents/requests at the first contact
- reducing reaction time and ensuring quick and efficient handling of requests and reported incidents by standardizing support processes
- implementing a centralized data repository of all technical support requests and ensuring their traceability
- creating an exhaustive and unified knowledge base for public services
- elimination of redirects from one authority to another
- ensuring effective collaboration and interaction of public service providers.

Under the MGSP (Modernization of Government Services Project), Electronic Governance Agency initiated the necessary procedures for acquisition of *Consulting services for the design, development, configuration and deployment of the Government Client Support Service Information System* (GCSS IS) – an IT solution/tool meant to ensure interaction of service providers with the beneficiaries of public services, within a single contact platform, through which the beneficiaries can request and receive assistance related to the provision of public services.

To maximize efficiency and to ensure proper commissioning and usability of the information system and client support services there is a need to create an integrated, exhaustive, well-structured, and flexible database of knowledge & information, but also determine & define applicable automation tools that will serve as decisional/consultative support for all parties involved in the support service processes.

The results of the current assignment will serve as inputs to the development of the support service platform – the Information System, and for overall commissioning of a modern, unified, customer oriented and self-improving Contact Center.

Services description, templates, procedures, processes, automation tools, all other relevant content together with defined mechanisms and functionalities of decisional support, developed under this assignment, will be populated, integrated and/or configured within the platform and will drive, at certain extent, the development of IS, thus ensuring a complex approach to the envisaged objectives. Also, the usage of AI-enabled (artificial intelligence) and Machine-learning features in line with the latest developments and best practices in the area that will help achieve a *state-of-art* government service is encouraged.

II. OBJECTIVE OF THE ASSIGNMENT

The objective of the assignment is to develop a structured, comprehensive, and integrated Knowledge base and define automation tools for GCSS that will represent the decisional and informational support both for support service providers and the beneficiaries/clients.

III. SCOPE OF WORK

3.1 The scope of work includes the following tasks:

Task 1. Analysis and preliminary assessment

- 1.1 Preliminary assessment of the current situation (operational models, capacity, and institutional activities on support/call center services; existing knowledge & decisional support / IT tools / regulations, etc.)
- 1.2 Determine and analyze concerns and expectations of key stakeholders referring to the provisioning of support services.
- 1.3 Define a prioritized list of public services for which the knowledge base needs to be developed (*NOTE: current sub-task will refer to the Services provided by Agency of Public Services, National Social Insurance House, E-Governance Agency, and Information technology and Cybersecurity Service*)
- 1.4 Conduct research to determine type and complexity of knowledge base needed and valid options for customer service automation.

- 1.5 Prepare analysis report outlining main findings, identified risks, and recommendations for successful implementation.

Note*: *During the Analysis and preliminary assessment phase, planned activities must be updated and put in appropriate chronological order, considering the results of this phase.*

Task 2. Define knowledge base architecture and automation options

- 2.1 Define detailed processes and flows for client - support service provider interaction, for all communication channels (phone call, chat, ticket, e-mail, or other), including IVR & ITR (*interactive voice response & interactive text response*) configurations, entry points, groups, queues, etc.
- 2.2 Define and describe knowledge base & decisional support model and structure (modules, components, functions & features; etc.), in accordance with the defined detailed process and the concepts of the Support Service and Information System.
- 2.3 Define automation tools and means of interaction through intelligent algorithms, potential without interference of a human agent (AI enabled, self-service, chatbots, digital agents, etc.)
- 2.4 Define knowledge base templates, style guide, and needed content (internal and client-facing, services description, reporting, disclaimers, SOP (*standard operation procedures*), etc.)
- 2.5 Define quality and efficiency assurance processes including knowledge base evaluation and updating, services monitoring.

Task 3. Develop Knowledge base & decisional support

- 3.1 Gather, analyze, classify, and map the relevant information and data.
- 3.2 Establish and create content in the needed format and structure (determine necessary content for each category/group, keywords, primary messaging, actions necessary for each article).
- 3.3 Establish number of entry points, queues, and escalation options.
- 3.4 Develop IVR / ITR flows, communication plan and messages.
- 3.5 Prepare FAQs (*frequently asked questions*) and templated responses, guides, manuals, list of useful links, other informative materials.
- 3.6 Consult and collaborate with the developer of the GCSS IS for proper integration and configuration of the defined knowledge base and automation tools in the information system.

Task 4. Development of e-Learning module

- 4.1 Develop training materials on the usage, maintenance, structure, configuration and management of the knowledge base and automation tools.
- 4.2 Develop e-learning modules based on Moodle LMS for relevant actors (agents/managers/content managers)
- 4.3 Assist the Client during the first trainings and adjust e-learning modules based on Client's/trainees feed-back.

Note*: All training content/materials will be provided in Romanian.

3.2 Perimeter of the assignment

The current project should be treated as an element of the continuous process of Public Services Modernization. The results/deliverables of the current assignment will serve as inputs to other launched and on-going activities related to the creation and commissioning of GCSS, therefore, at this stage the perimeter of present assignment will be as follows:

Tasks under the assignment	Perimeter
<p>Task 1 – <i>Analysis and preliminary assessment</i></p> <p>Task 2 – <i>Define knowledge base architecture and automation options</i></p>	<p>The Consultant will refer mainly, but not limited to the following legal acts:</p> <ol style="list-style-type: none"> 1. LAW No. 234 dated 23-12-2021 regarding public services. 2. G.D. No. 670 dated 03-09-2020 regarding the approval of the integrated Nomenclature of public administrative services and the List of life events associated with them. <i>Annex 1: The integrated nomenclature of public administrative services</i> <i>Annex 2: List of life events associated with public administrative services.</i> 3. G.D. No. 314 from 22-05-2017 regarding the establishment of the Public Services Agency. 4. G.D. No. 230 from 10-04-2020 regarding the organization and functioning of National Social Insurance House. 5. G.D. No. 414 from 08-05-2018.
<p>Task 3 – <i>Develop knowledge base and decisional support</i></p> <p>Task 4 – <i>Development of e-Learning module</i></p>	<p>The Consultant will refer to the defined prioritized list of public services provided by the following national authorities and service providers:</p> <ul style="list-style-type: none"> - Agency of Public Services - National Social Insurance House - E-Governance Agency - Information technology and Cybersecurity Service

IV. DELIVERABLES:

TASK 1: Analysis and preliminary assessment

- Analysis report on preliminary assessment.
- Project implementation plan.

TASK 2: Defining knowledge base architecture and automation options

- Document on knowledge base and intelligent decisional support description, architecture, model, and structure.
- Defined detailed workflows and processes for support services.
- Defined style guide, templates, forms and data sets for services description, support services processes & interaction, quality & efficiency assurance processes.

TASK 3: Develop knowledge base & decisional support

- Full Knowledge base and decisional support content (FAQs, guides, manuals, services description, useful links, etc.).
- Consultancy for knowledge base integration and configuration in GCSS IS.

TASK 4. Development of e-Learning module

- Training Materials.
- eLearning modules developed and adjusted.

V. REPORTING OBLIGATIONS

All reports and deliverables listed under chapter IV above will be submitted in Romanian.

VI. INSTITUTIONAL ARRANGEMENTS

The Consultant will work under the direct supervision of the GCSS Project Manager who will approve all the deliverables and facilitate the Consultant's access to the necessary documents, materials, and key stakeholders to the assignment.

VII. TIMING

The overall estimated period for implementation of the assignment is 6 months, starting with contract signing, and planned as follows:

Task 1: Analysis and preliminary assessment – in 4 weeks from the start of the assignment.

Task 2: Define knowledge base architecture and automation options– in 8 weeks from the start of the assignment.

Task 3: Develop Knowledge base & decisional support – in 16 weeks from the start of the assignment.

Task 4: Development of the e-Learning module – not later than week 20.

VIII. QUALIFICATION REQUIREMENTS

Consultant qualification requirements:

- Minimum five (5) years of experience in the field of institutional, operational, functional analysis, business processes analysis, institutional development, and/or process management in public or private institutions.
- Demonstrated experience in assignments of similar complexity related to Contact/Call/Service Center development, optimization, or upgrade. Or experience in providing Contact/Call Center services during at least the last three (3) years.
- Demonstrated experience in development or implementation and configuration of automation tools/solutions (chatbots; voice assistance; digital agents; other AI & machine learning mechanisms) for Contact/call centers or Customer Relationship Management platforms in the last 3 years will be a strong asset.
- Demonstrated experience in implementation, configuration, or integration of PBX (private branch exchange) telephone systems for Call/Contact Centers during last 3 years will be an asset.

- Experience in implementing similar projects in Public/Governmental institutions in the last 3 years will be considered an asset.
- Certification ISO - 9001 or similar will be considered an asset.

The Consultant shall furnish documentary evidence (organization chart, information about the completed contracts/projects and contact information of clients from whom the references could be taken) to demonstrate that it meets the qualifications requirements.

Staff qualification requirements

The consultant shall provide a team of the following key experts:

- **Key expert 1. Business Analyst - 3**
- **Key expert 2: Content developer - 1**

For proposed key experts the CVs need to be submitted, demonstrating the minimum qualifications requirements, as detailed below:

Key expert 1. Business Analyst

- University degree in Computer Sciences or another relevant domain.
- Minimum 5 years of experience in functional and/or business process analysis & management.
- Experience with BPA/BPM tools and ability to define illustrate processes via corresponding tooling.
- Experience in writing technical, non-technical, and user documentation related to business processes, service description, requirements, quality criteria and other relevant documentation for public institutions.
- Experience in functional and/or business process analysis & management in IT area will be an asset.
- Flexibility, problem solving attitude, capacity of working with beneficiaries and analytical thinking.
- Fluency in Romanian.
- Ability to communicate in English and Russian language will be an asset.

Key expert 2. Content developer

- Minimum 3 years of experience in providing training and development of training materials.
- Experience in developing of training modules using e-learning platforms.
- Minimum one successful training module developed and provided using e-learning platform based on Moodle.
- Excellent skills/experience in writing technical, non-technical, and user documentation.
- Fluency in Romanian.
- Certifications in Moodle training is an asset.

Other requirements:

- *The consultant will appoint a team leader from the proposed business analysts who will be responsible for the day-to-day liaison with the eGA; s/he must ensure the internal*

coordination and guidance of all experts of the project and coordination of the project with external counterparts. The Team Leader must also ensure availability of suitable experts in accordance with the Project Work Plan. The Team Leader shall oversee that all reporting obligations are fulfilled in a timely manner to a high-quality standard.

- *At least one of the proposed Key-experts must have experience and good understanding of ITC technologies and tools with the perspective of defining applicable automation options for support services processes, including AI and Machine Learning mechanisms.*