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SOUTH AFRICAN SOCIAL SECURITY AGENCY

Request for Information specifications for Cloud-based Omni-channel Contact Centre as a Service (CCaaS)

1.1 Purpose of the RFI

SASSA invites OEMs and their local Distributors (South Africa) to provide information on an **Omni-Channel Contact Centre as a Service (CCaaS)** solution capable of delivering **high-volume citizen services** relating to **social grants enquiries** across South Africa. **Responses from Resellers will not be considered.**

The RFI will be used to:

- Assess market capabilities and solution maturity
- Determine architectural options and integration approaches
- Inform a future procurement strategy Request for bid (RFB), including estimated costs and implementation approach
- Identify risks, dependencies, and readiness requirements

NB. This RFI is an information gathering process and not a request for proposals and does not constitute a commitment to procure.

1.2 Background and Service Context (High-Level)

SASSA supports citizens and social grant beneficiaries nationally through multiple service channels including:

- **Voice calls** (high-volume, nationally distributed)
- **Email** (high-volume, nationally distributed)
- **WhatsApp**
- **Web chat**
- **SMS**

The contact centre must support:

- Citizen enquiries, complaints, application status checks, and information requests
- Integration to backend grant systems (current and future)
- Secure handling of personally identifiable information (PII)
- High availability, resilience, and business continuity

1.3 ACRONYMS

Acronym	Description
ACD	**Automatic Call Distribution** – the contact centre capability that automatically routes inbound calls to the appropriate queue or agent based on configured business rules, skills, priority, and availability.
CRM	**Customer Relationship Management** – the system or platform used to manage customer records, cases, interaction history, and service workflows across contact centre channels.
DTMF	**Dual-Tone Multi-Frequency** – the touch-tone signalling used when callers press keys on a telephone keypad, typically for IVR menu navigation and data entry.
DR	**Disaster Recovery:** the processes, architecture, and failover arrangements used to restore services after a major incident.
IVR	**Interactive Voice Response** – the automated telephony system that allows callers to interact using voice prompts or keypad input and routes them to the appropriate service option or agent.
Local Distributor	**A Local Distributor** is the South African in-country partner of the technology manufacturer who can legally and operationally provide the solution locally.
OEM	**Original Equipment Manufacturer** – the principal vendor or product owner that develops, owns, and supports the core solution or platform.
Omni-channel (CCaaS)	**Omni-channel Contact Centre as a Service** – a cloud-based contact centre platform that enables customer interactions to be managed seamlessly across voice and digital channels such as email, WhatsApp, web chat, SMS, and social channels from a unified service environment.
Reseller	**A reseller** is a third party that markets and sells another company's IT solution to customers.
RFB	**Request for bid** is a formal procurement invitation issued to suppliers to submit competitive bids, including pricing and delivery proposals, for a defined solution or service
RFI	**Request for Information** – a preliminary procurement document used to gather information from potential suppliers about their capabilities, solutions, and approaches before a formal solicitation process.

RTO	**Recovery Time Objective:** the maximum acceptable time to restore the service after a disaster or major outage.
RPO	**Recovery Point Objective:** the maximum acceptable amount of data loss, measured as time, between the last recoverable backup or replicated state and the disruption.
RESTful APIs	**Representational State Transfer application programming interfaces** – standards-based web interfaces that allow secure system-to-system integration and data exchange over HTTP using resources, standard methods, and structured payloads such as JSON.
SASSA	South African Social Security Agency (The Agency)
SIP	**Session Initiation Protocol** – a signalling protocol used to establish, manage, and terminate voice or multimedia communication sessions over IP networks.
USSD	**Unstructured Supplementary Service Data** – a session-based mobile communication protocol used to enable real-time interaction between a user's mobile phone and a service application over a GSM network.

1.4 Scope of the CCaaS Solution

Respondents must describe solutions covering the following areas:

1.4.1 Channels (Omni-Channel)

Minimum required channels in scope:

- **Voice (inbound and outbound) (SASSA makes use of SIP technology)**
- **Email (case-linked)**
- **WhatsApp (and/or WhatsApp Business Platform integration)**
- **Web chat**
- **SMS**
- **Social channels (e.g., Facebook Messenger)**
- Channel capabilities for citizens with disability (e.g. hearing disability) (future)
- USSD integration
- Channel/s to cater for non-smart phones

Additional channels not mentioned in the section above can be provided.

Functional capabilities

- ACD Routing (Automatic Call Distribution) and Interactive Voice Recognition (IVR)
- Agent desktop and supervisor tools
- Knowledge and scripts/guided workflows
- Reporting and analytics
- Quality management and recording
- Workforce management (forecasting/scheduling) (preferred)
- Digital self-service and bots (preferred)
- Case/ticket integration (CRM/service platform integration)
- Email enquiries auto-logging

Non-Functional capabilities

- Security, privacy, compliance, and auditability
- Availability, resilience, Disaster Recovery (DR) and failover
- Performance at national scale
- Interoperability and integration
- Scalability and future expansion

1.5 Key Requirements (Respondents must address)

1.5.1 High-Volume, National Citizen Service

Provide details on:

- Maximum supported concurrent agents and interactions
- Peak concurrent call capacity (voice) and expected SLA capability
- Multi-site operations and remote/hybrid agent support
- Ability to support multilingual IVR and agent operations (SA context)

Respondent must provide evidence (reference customers, scale metrics, or performance benchmarks).

1.5.2 Voice Capabilities (Inbound/Outbound)

Must support:

- IVR with speech and Dual-Tone Multi-Frequency (DTMF) options
- Skills-based routing, priority routing, overflow routing
- Queue announcements and callback options (virtual hold)
- Scheduled outbound and/or predictive/progressive dialing

- Call recording with retention policies and lawful access controls
- Real-time monitoring: whisper, barge-in, listen

1.5.3 Digital Channels (Email + WhatsApp)

Minimum capability:

- Unified inbox / agent desktop handling voice + digital
- Conversation continuity and context preservation
- Message templates and approval workflows
- File attachment handling and secure redaction (where applicable)
- Digital channel routing rules, SLAs, priority queues
- Bot-to-agent handover with full context transfer (preferred)

WhatsApp: Respondents must specify:

- WhatsApp integration method (native vs third-party)
- Compliance capabilities (consent, auditing, retention)
- Limits, throughput and session management

1.5.4 Omni-Channel Routing & Customer Journey

Must support:

- Unified routing engine across channels
- Business rule-based routing (language, region, grant type, vulnerability/priority)
- Customer identification and authentication workflows
- End-to-end interaction history and linkage (voice + digital)
- Queue management across channels and skills
- Intent-based routing
- Sentiment detection and escalation triggers
- Journey analytics and
- Repeat-contact reduction tooling/capability

1.5.5 Agent Desktop & Productivity

Must support:

- Web-based agent interface
- Single sign-on (SSO)
- Screen-pop and integration widgets for backend systems
- Interaction scripts, dynamic forms, and guided assistance

- After-call work (ACW) controls and wrap-up codes
- Knowledge search and inline knowledge suggestions
- Accessibility and usability controls
- AI-generated summaries and disposition recommendations
- Real-time agent assist (policy prompts, compliance prompts)

1.5.6 Supervisor & Operations Management

Must support:

- Real-time dashboards (queues, service levels, adherence)
- Historical reporting
- Agent performance tracking
- Quality management (QM): evaluations, scorecards
- Coaching workflows and feedback loops
- Workforce management (forecasting, scheduling, intraday management)
- Gamification (optional)

1.5.7 Reporting, Analytics & Audit

Must provide:

- Standard reports and ad-hoc reporting capability
- Exportable reports (CSV/Excel) and API access
- Role-based access and audit trails
- Interaction with metadata storage and retrieval
- Recording search and replay controls with approvals and audit
- Speech analytics for compliance and call drivers
- Digital text analytics for themes and escalation trends

1.5.8 Integration Requirements (Core)

Respondents must support integration into SASSA systems via secure APIs.

Minimum integration patterns:

- RESTful APIs, webhooks/event streaming, SDKs
- CRM/case platform integration
- Identity and access management integration
- Data exchange with knowledge/content repositories

Integration to Contact Centre + Case System Model: SASSA anticipates either:

- CCaaS platform as engagement layer + external case system, or
- CCaaS with embedded case capabilities

Respondents must explain both options where possible.

1.5.9 Security, Privacy & Compliance

Respondents must provide detailed responses on:

- Encryption in transit and at rest
- Key management (KMS, customer-managed keys preferred)
- Role-based access control (RBAC)
- Segregation of duties (admin vs supervisor vs agent)
- Privileged access management
- Audit logging and log retention
- Data loss prevention (DLP) and redaction options
- Call recording access controls

*1.5.10 **Data residency** (must be in South Africa) **& sovereignty:***

- Location of hosting (cloud region) and options for local/regional hosting
- Sub-processor list and governance
- POPIA-aligned features and controls (policy-based retention, access logging)

1.5.11 Resilience, High Availability & Disaster Recovery

- Architecture overview (regions, availability zones, redundancy)
- Availability SLA (monthly uptime) and service credits
- RTO/RPO for DR
- Multi-carrier voice resilience option
- Offline/continuity procedures for agents

1.5.12 Implementation & Transition

- Proposed implementation approach (phased rollout recommended)
- Typical timeline for a comparable public-sector deployment
- Change management and training approach
- Data migration approach (if replacing existing platform)
- Cutover strategy and parallel run options
- Operational support model (L1-L3)

1.5.13 Support & Service Management

- Support hours, escalation, and incident response SLAs
- Local support capabilities in South Africa
- ITIL-aligned processes
- Monitoring and service health dashboards
- Release management approach and notification timelines

1.6 Information Requested from Respondents (RFI Questionnaire)

1.6.1 OEM/Local Distributor Profile

1. Legal entity details (OEM + local distributor)
2. Local presence (South Africa footprint)
3. Contact centre CCaaS product name and edition
4. Certification status (OEM authorized partner/s, local support capability)

1.6.2 RFI Notes & Conditions

- SASSA may invite selected respondents for a **product demonstration**
- SASSA may request clarifications or additional information
- RFI responses may be used to inform a subsequent procurement process
- Any costs incurred in responding are for the respondent's account

Disclaimer

SASSA makes no obligation or undertakings in any way to;

- Issue a tender
- Include respondents to this RFI in any future tender invitation
- Make any other commitment to respondents, including any intention to enter a contract for the implementation of the Contact Centre as a Service solution

SASSA reserves the right to cancel the RFI at any time without prior notice.

1.7 Information Requested

Interested vendors are requested to provide detailed information on the following aspects of their solutions:

1.7.1 Company Information

- Company profile and history.
- Experience in implementing Contact Centre as a Service solution
- Key clients and case studies relevant to this RFI.

1.8 Submission Guidelines

Respond by submitting a 15–20-page proposal (excluding Additional Information) addressing how your proposed Contact Centre as a Service solution will be implemented and supported.

Interested vendors should submit their responses as per the cover page for this RFI indicating the following minimum information:

- A cover letter summarizing the vendor's interest and suitability for the project.
- Contact information for the primary point of contact.
- Supplier Information
- Solution Overview
- Development and Implementation Methodology
- Pricing Structure
- Proof of Compliance