

**TERMS OF REFERENCE (TOR)**  
**TRAINING SERVICE PROVIDER FOR THE CUSTOMER SERVICE SKILLS**  
**WORKSHOP ON February 02, 03, 04, and 07, 2022**

**BACKGROUND**

The Negosyo Center Program is responsible for promoting ease of doing business and facilitating access to services for Micro, Small and Medium Enterprise. The Negosyo Centers are catering to the needs of MSME and potential MSME (clients) nationwide. As of November 2021, Negosyo Centers have assisted a total of 372,071 MSMEs and 717,448 Clients. Looking at the huge number of people being assisted by our Negosyo Center Business Counsellors, it is worth noting that they are playing a big role in the growth and advancement of the MSME sector and the Philippine Economy.

One of the most important skill to possess by someone in the frontline is Customer Service Skills. By having excellent customer service skills, the Negosyo Centers will be able to deliver exemplary service to our clients and likewise achieve one of its goals which is to help stimulate entrepreneurship development as MSMEs contribute substantially in driving the Philippine economy.

As such, as part of the Negosyo Center Business Counsellors General Assembly, the Negosyo Center Program Management Unit (NC-PMU) desires to conduct a virtual training as one of the capacity building program for NCBCs as follows:

- Learning Program: Customer Service Skills Workshop
- Schedule: 02,03,04, and 07 February 2022 With at least 4 hours of virtual learning sessions per day (afternoon session)
- No. of Participants: 1300 pax (325 pax per session per day)  
Number of participants may vary
- Platform: Zoom

**OBJECTIVES:**

To equip learners with the knowledge and skills of delivering effective customer service.

**LEARNING OUTCOMES:**

At the end of the session, participants would be able to:

- a. Refresh learner's awareness of the importance of delivering a positive customer service;
- b. describe exceptional customer service;
- c. identify the benefits of a great customer service;
- d. improve their ability to interact with customers, clients, stakeholders and co-workers;

- e. improve their communication skills over the phone and in person including official social media platforms;
- f. develop techniques in handling demanding customers and difficult situations;
- g. identify why there are unhappy/irate government customers and the most common complaints received by Negosyo Centers;
- h. know the powerful service strategies applicable in Negosyo Centers

### **SCOPE OF WORK/DELIVERABLES:**

The learning Service Provider (LSP) must:

#### **Pre-Session:**

1. Design and develop a proposed course outline/ module for approval of the end-user
2. Design and develop pre-diagnostic assessment schemes/tools
3. Discuss and finalize with the NC PMU team via online meeting the course design and modules, pre and post assessment test
4. Conduct pre-diagnostic assessment to determine learners' opportunity for improvement and to be able to tailor-fit the course outline
5. Submit presentation materials to NC PMU 3 days before the actual run of the program
6. Poster Announcement or Teaser video

#### **In-Session:**

1. Administer pre-test and post-tests within the learning sessions;
2. Provision of Speaker
3. Zoom moderator and program management committee

#### **Post-session:**

1. Provide evaluation instrument to be used by supervisors to measure the effectiveness of the training and improvement of the participant's in product development.
2. Provision of e-certificates, post-program/terminal reports, and raw and edited file recordings of the whole learning session

### **METHODOLOGY:**

The program should be synchronous, with exercises, discussions, and creative activities to complement the lectures. The programs will take place in a real-time live zoom meeting/webinar. The facilitator and participants shall log into the learning platform at the same date and time. The facilitator will deliver the lectures, demonstration or other planned learning activity. The process is live and learner may ask questions in real time.

### **QUALIFICATIONS OF THE LEARNING SERVICE PROVIDER:**

- a. Must have at least three (3) years of experience in providing training and learning interventions in government and private offices;

- b. With completed contract with reputable clients, with at least 3 government agencies in the pool;
- c. Must submit a customized proposal tailor-fit to the organization's needs and objectives not generic, one-size-fits-all materials including course outline;
- d. Must be able to provide qualified subject matter experts based on the stated specifications;
- d. Must be able to provide for use in this project a licensed zoom account to host the entire online training;
- e. Must be able to provide a moderator and program management committee that will take care of the online training using zoom technology;
- f. Must provide list of key persons involved with respective work assignments during preparation and actual learning session such as project management team and moderators and the like, with their curriculum vitae;
- g. Trainer/s to be deployed must have Bachelor's degree preferably with Master's degree and/or minimum of 3 years' experience in related field and have been conducting online workshops, conferences, webinars;
- h. Proposed program cost is within the approved budget cost

**Criteria for scoring:**

Technical proposal: 70% (should score a minimum of 75 points)

Financial proposal: 30%

**TARGET PARTICIPANTS:**

- a. There shall be a **1,198 Business Counsellors** manning the Negosyo Centers nationwide. They are tasked to provide/facilitate the various services being offered by the center to include, but are not limited to the following: Business Registration; Business Advisory; and, Business Information and Advocacy;
- b. And **102 Contractual Trade Industry Development Analyst** assigned at the Head Office, Regional and Provincial office assisting in the planning, organizing, and coordinating with the respective offices and other NGAs and private sectors in the implementation of services of the NC all over the country;

**APPROVED BUDGET:**

The approved budget is **THREE HUNDRED NINETY THOUSAND PESOS** (Php 390,000.00) inclusive of all applicable fees and taxes.

**SCHEDULE OF PAYMENT:**

Payment shall be made within 30 working business days upon submission of documented final report of the entire session.

**SUBMISSION OF BIDS**

Interested bidders are requested to submit their technical proposal with the following details:

1. Customized proposal tailor-fit to the organization's needs and objectives not generic, one-size-fits-all materials including course outline;
2. List of clients for the last 5 years which includes (1) title of the training program (2) training program description (3) name of company/clients (4) amount of contract (5) number of participants (6) number of times program was conducted (7) duration of training and completion.
3. Resume indicating qualifications of individual consultant/resource person to be deployed, including educational background, years of experience, projects undertaken, client base and certifications/accreditations, if any.
4. Total program cost inclusive of VAT
  - Winning bidders will be requested to meet the end-user online to discuss the proposal
  - Further adjustments to the program design may be requested by the end-user from the winning bidder

**Criteria for Evaluation of Technical Proposal  
Customer Service Skills Workshop**

**Technical Proposal (70%)**

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**1. Expertise and Professional Experience of Trainer to be deployed (30 points)**

- a. Education
  - Bachelors Degree in any related course
  - Masters Degree in any related course

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| <b>Points</b> |
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10 points  
15 points

- b. Work Experience

3 to 4 years of related work experience  
more than 5 years of related work experience

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|---------------|
| <b>Points</b> |
|---------------|

10 points  
15 points

**2. Expertise and Capability of the firm (20 points)**

**a. Years of experience**

a. Years of experience ( as a private learning and development firm)

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| <b>Points</b> |
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3 to 4 years of experience as a learning and development firm  
more than 5 years of experience as a learning and development firm

7.5 points  
10 points

- b. No. of related and completed projects undertaken with government agencies and private institutions

Undertaken related or similar projects with 3-4 national government agencies & private institutions

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| <b>Points</b> |
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Undertaken related or similar projects with 5-5 national government agencies & private institutions  
Undertaken related or similar projects with more than 7 national government agencies & private institutions

7.5 points  
9 points  
10 points

**3. Course Design and content (50 points)**

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| <b>Points</b> |
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**Poor** ( The learning objectives were not identified. The proposed design/content is ambiguous . The proposed methodology is not responsive to the proposed design and there are no tools to supplement the learning experience.)

19 points and below

**Fair** (The learning objectives are vague and are not measurable. The proposed design/content lacks the required elements to support the learning objectives. The proposed methodology may not be that responsive to the proposed design. The proposed tools are not sufficient to provide an effective learning experience.)

20-35 points

**Good** (The proposal meets all the required learning objectives. The proposed design/content is thorough, and meets the minimum requirements of the course reflected in the TOR. The proposal is responsive to the required methodology and utilizes tools appropriate to the training format.)

36-45 points

**Excellent** (The proposal meets all the required learning objectives. The proposed design/content is thorough, and presented in an outstanding manner, shows creative, modern, and innovative elements. The methodologies are responsive to the overall proposal/training design and introduces new tools appropriate to the training format.)

46-50 points