**Annex II Technical Proposal**

**Company name: \_\_\_\_\_\_\_**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **SECTION 1: SPECIFIC EXPERIENCE FOR THE ASSIGNMENT.**  1.1 Please provide details of your partnerships and projects of past work experience in developing financial products and services, deployment of digital financial products and marketing of financial services and products in India.   |  |  |  |  | | --- | --- | --- | --- | | Name of the project |  | | | | Grant/contract value (USD) |  | Website if applicable | | | Target Country(ies) |  | Implementation Period |  | |  | | | | | Name of the Client/funder |  | | | | References contact details | name | position | phone number email | |  |  |  | |  | | | | | Description of the approach/methodology |  | | | | Key outputs/deliverables produced |  | | | | Key Performance Indicators/ Targets |  | | | |  | | | | | Names of the staff that participated in the assignment |  |  |  | | Knowledge product production and dissemination strategy of the assignment |  | | |   **(copy/paste table above if you wish to add other relevant projects)** |
| 1.2 Demonstrate your organization’s understanding of potential risks and risk management strategy to develop the proposed financial product. (max 1 page)   |  |  |  |  |  | | --- | --- | --- | --- | --- | | # | **Risk** | **Probability of Occurring** | **Impact** | **Management / Mitigation strategy** | | *1.* |  | Low  Medium  High |  |  | | *2.* |  |  |  |  | | *3* |  |  |  |  | | *4* |  |  |  |  | |
| **SECTION 2: APPROACH AND IMPLEMENTATION PLAN (maximum 20 pages)**  (Applicant(s) may use info-graphical / diagrammatical explanation for their response) |
| 2.1. 1. Explain and demonstrate your experience in creation/ conceptualizing/ delivering financial products. Please highlight the region, target segment, and details on the product created or launched. |
| 2.2 2. What kind of product do you envision will work in Odisha for encouraging and enhancing savings of the people in rural areas, with a focus on SHG women. Describe the key features and considerations to be made in this product. (2 pages max) |
| 2.3. 3. Why do you think products that encourage people to save and enhance savings of rural communities have not worked well in the past? What challenges do you foresee in Odisha? How will you overcome these through your work? (3 pages max) |
| 2.4. 4. Explain the delivery mechanisms to take this product to the last mile. What will be the incentive structure for the delivery channel?( (2 pages max) |
| 2.5. What is the support you will require from Financial Health programme and Mission shakti for the development and deployment of Financial product. (Max 2 pages) |
| 2.6. What will be the revenue model that you will use for creation to delivery of this product? Who will be the stakeholders involved in this process and what will be their roles? (3 pages max) |
| 2.7. Explain the team structure including role, designation, years of experience of each team member for this proposal. In case of a consortium highlight the role of each organization in the proposal. (2 pages max) |
| **SECTION 3: PERSONNEL** |
| 3.1. Management Structure: Describe the overall management approach toward planning and implementing this activity. Include an organization chart for the management of the project describing the relationship of key positions and designations along with information on the roles and structure of any sub-grantees, contractors, or other critical relationships. |