SHARED SERVICES CANADA
Challenge-Based Solicitation (CBS)
For
Robotic Process Automation

Solicitation No.	2BS-1-91027	Date	2021-07-26

What We Heard Report

Under Agile Procurement Process 3.0 (APP3.0), Shared Services Canada (SSC) is piloting an improved model of engagement with the private sector. The goal is to collect supplier feedback throughout the procurement process and to quickly refine procurement elements, as necessary. SSC is committed to listening to suggestions from vendors with an open mind and reporting back to them in a transparent way.

What We Heard No.	001
Where We Heard	Kick-off webinars and 1-1 sessions
When We Heard	June 18, 2021 – June 23, 2021

Thank-you for your feedback and questions about the Agile Procurement Process and various requirements.

Key Findings

Through the one-on-one sessions, email exchanges with the point of contact and survey responses, we asked vendors to highlight areas of the Minimal Viable Requirements (MVRs) that were unclear. We received over 60 individual written feedback responses in reply to the survey and considered the responses for the Minimal Viable Requirements (MVRs).

Several vendors had questions about the agile process and what's coming next; as well as questions about requirements for BOT Execution, OCPG, BOT Lifecycle management, Environment – both operational and deployment, NAF, and Capabilities to Augment Automation requirements.

Based on your responses we will be:

- clarifying 6 requirements: BOTLM1, ENV1, ENV 7, NAF – PMD2, CAA11
- anticipating changes to an additional 3 requirements: BOT-A3, OCPG, ENV5
- and dropping 2 requirements: CAA3, CAA4.

Theme: The Solution

What We Heard - 1

We found some software solutions that were clearly aligned with the RPA commercial product segment.

SSC's Remarks - 1

However, there were some proposals that we received which were not primarily an RPA software solution nor have RPA technology as the primary commercial product. Some solutions were more BPMS oriented and integrated some of the more popular automation features inherent to RPA. They were not an RPA product that stood independently. For clarity, we are looking for a solution that focuses primarily on the RPA segment of the commercial market.

Theme: Professional Services

What We Heard - 2

We received many questions during the presentations for Stream 1, Software Solution, and found some overlap in the participants who signed up for both RPA Solution stream and the Professional Services stream.

SSC's Remarks - 2

There was great interest from some of the vendors during the solution sessions who are Value Added Resellers (VARs), but who are also interested in the Professional Services stream. Many VARs expressed indifference towards Canada's short list for RPA technologies and/or are RPA product agnostic. Inviting VARs to the solution stream is advantageous because this is an open and collaborative process and secondly, as we are in the early stages of this Challenged-Based Solicitation, there remains a lot to be seen and learned. At a later date, when a software solution is selected by Canada, there may be opportunities for VARs to resell the selected software solution to Canada. Therefore, VARs are welcome to participate in both the solution and professional services streams. This participation may include and is not limited to joint venture proposals. This invitation remains open because this CBSOS is for all of government (all departments, crown corporations and agencies) and not just for Shared Services Canada. Each department has a unique mandate and therefore varying needs.

Theme: Survey Highlights

What We Heard - 3

The majority of your comments and questions centered around BOT Execution, OCPG, BOT Lifecycle management, Environment – both operational and deployment, NAF, and capabilities to augment automation requirements.

SSC's Remarks - 3

Below is our clarification of the requirements and they will be reflected in the CBSOS on Buy and Sell.

BOTLM1: The BOTLM must be able to queue updates to unattended workflows in production to allow for review and acceptance prior to implementation.

- **Clarification**: We are requesting this requirement because in a large organization and in an operation scenario, the solution must be able to provide a framework around the development lifecycle for new workflows or updating existing workflows. For example, the ability to limit development to a group of users, and the capability to move new workflows in and out of production. This enables departments to containerize their development and conduct user acceptance testing (UAT) prior to production deployment.

BOT-A3: The solution must be able to monitor active BOT workflow processes.

- **We anticipate changing the text to the following**: The solution must be able to provide insights on active bot workflow processes for the CoE or the operations team. We anticipate this change will clarify that we would like visibility into bot workflow activity.

CAA3: The solution must be able to use workflows for supervised and unsupervised training of ML models.

- **We anticipate dropping this requirement**. Please keep up to date on Buy and Sell.

CAA4: The solution must not extract training data from ML models.

- **We anticipate dropping this requirement**. Please keep up to date on Buy and Sell.

CAA11: The solution must be able to use prior versions of AI / ML models.

- **Clarification**: TBS policies require that when "AI" is used in automated decision-making systems, we must maintain the ability to use any prior model on demand. The ML model is required for audit and review purposes. For this reason, we specify that if a software solution is involved in building, supplying, and training its own internal models, we request that the version history be maintained and ability to rollback versions is readily available for the end user. Additional information can be found on [Treasury Board's Website](#) under section 6.2.

ENV1: The solution must be deployable in Government of Canada infrastructure datacentres, private cloud, and public cloud.

- **Clarification**: In the survey feedback and during the presentations, some participants requested additional information for the Government of Canada Cloud Solutions. We understand, knowing which cloud providers Canada uses is important for setting up the environment and selection of a solution. For your convenience and information, please review the *[Government of Canada Cloud Adoption Strategy: 2018 update](#)* and the *[GC Cloud Brokering Providers](#)*.

ENV5: The solution must meet FedRamp and PCI security standards and certifications.

- **We are considering changing this requirement:** PCI Security will reference Protected A/B aligned with Canadian Standards, like [ITSG-33](#) or [Appendix J](#) from Treasury Board. Dropping Fedramp as it is not a Canadian standard. Please keep up to date on Buy and Sell.

ENV7: The solution must be able to set minimum and maximum settings for workload capacity.

- **Clarification**: The number of digital workers (or bots) assigned to run workflows must have resource flexibility, set scaling options or thresholds. The settings need to include a minimum and maximum for digital workers (or bots) assigned to a particular workflow or process so that the resources can increase or decrease dynamically. We anticipate changing the wording from "*workload capacity*" to "*workload management*". Please keep up to date on Buy and Sell.

NAF-PMD2: The solution must have predictive analysis, prescriptive analysis, scenario testing and simulation for process automation.

- **Clarification**: NAF are not part of the minimum requirements but should assist you or provide guidance on features that might be desirable for other government departments (OGD) for this standing offer. NAF(s) can be used as differentiators for assessment purposes in this standing offer.

OCPG1: The workflow must be scheduled by the developer to run multiple times during the day on various environments to show multi tenancy

- **We anticipate changing the text to the following**: The orchestrator or control panel must be able to task multiple digital workers/bots to the same workflow or process.

Theme: What are the next steps?

What We Heard - 4

We have received a variety of unique software solution proposals. Some align with the expectation of delivering a pure RPA software solution and some focus on other software market segments.

SSC's Remarks - 4

The intent is to qualify multiple solutions in the 'solution' stream. This challenge based standing offer (CBSO) will be amended to include a segment for prequalification. The Offeror will be invited to submit information through a qualification bid form. The Qualification Bid form responses will be evaluated, with the intent to qualify offerors that have RPA solution already available to move to the next wave of Invitation to Refine. The prequalification will have both mandatory and scored or rated items. Vendors will be able to participate in our prequalification process and could present additional information that will be requested to refine the requirements. Software companies as well as resellers are eligible to participate.