Double click to replace this image.Choose one related to **[Company Name]'s** brand.

[*Company Name*]

REQUEST FOR PROPOSAL

[Company Name] RFP Table of Contents

1. Introduction

[Introduce your company to the Parties]

2. Response Guidelines

All responses must be submitted electronically no later than {date to be determined}. Please direct all questions, communications and RFP submissions to:

[Enter the Contact Information of the Person compiling the RFP for your ORG]
(please use the Subject line "RFP: Contact Center Platform: *your company name*")

Qualified vendors must respond to each item listed in Section 4: Vendor Response. [Company Name] will be pleased to answer any vendor questions.

All responses become the property of [Company Name]. Failure to submit responses according to these guidelines may result in rejection of the entire response. [Company Name] may request clarification of any responses in whole or in part.

3. Vendor Evaluation and Selection

The criteria for vendor selection will be based on the combination of factors that is most advantageous for [Company Name] in terms of functionality, price, quality, vendor qualifications, and other factors which [Company Name] deems appropriate. Before proceeding further, selected vendors will be asked to demonstrate their product or service to ensure it meets all the necessary qualifications.

INSERT LOGO HERE

Vendor Proof of Concept (POC) Presentations

Each recipient of this Request will be asked to participate in a preliminary overview/test of their product offerings. Following the evaluation of responses to this RFP, one or more leading candidates will be invited to provide a Proof of Concept/Trial for evaluation by [Company Name].

Vendor Selection

[Company Name] reserves the right to base its final decision on any combination of requirements or specifications presented in this RFP. [Company Name] reserves the right to prioritize or waive requirements in whatever way serves its best interests in making a final selection decision.

Use and Disclosure of Information

[Company Name] will consider all responses to this RFP as confidential and proprietary to the vendor submitting the response.

Information disclosed in this RFP is proprietary to [Company Name] and must be treated by vendors as confidential. This information is to be used solely for the purpose of preparing a response to this RFP. This information may not be used or shared with other parties for any other purpose without [Company Name] written permission.

Vendor Costs

Costs for developing the response to this RFP and participating in any subsequent product demonstrations, POCs or presentations are entirely the responsibility of the vendor responding to this RFP and shall not be chargeable in any manner to [Company Name].

4. Vendor Response

Vendor Overview
- What is your company's legal name, address, phone number, and URL?
  Provide the date and state of incorporation.
  - Legal Name:
  - Address:
  - Phone Number:
  - URL:
  - Date & State of Incorporation:
- Provide the name, title, address, telephone number, fax number, and email address for the person submitting this proposal.
  - Name:
  - Title:
  - Address:
  - Phone Number:
  - Fax:
  - Email:
- Briefly describe your organization. Include the following:
  - Business background and history:
  - Ownership structure:
  - Subsidiary relationships:

- ○ Acquisitions and/or mergers:
- ○ Number of years in the Contact Center Platform business providing the service(s) proposed in this RFP:
- ○ Number of employees:
- ○ Number of customers using your products:
- ○ Provide financial information that speaks to the current financial health of your company and its prospects for future financial health, including audited financial statements for the last two (2) years, Dun & Bradstreet rating, Moody's and Standard & Poor's ratings, Gartner, etc.
- What are your top competitive advantages as a company and for the products and service(s) proposed in this RFP?
- Specific to the products and services covered in this proposal, are any delivered via a subcontractor partner?
- [Company Name] requires [Enter your Payment Terms] Payment Terms. Do you provide other payment terms?

Implementation

1. Provide an overview of a typical implementation including the expected timeline, implementation methodology and requirements for management & support personnel. Also provide a typical staffing model for post-go-live operational support and maintenance.

EXAMPLE PROJECT PHASES:

2. Provide examples of any templates/workbooks/workshops/status reports that you provide?
   - ○ Please see the following attachments for i and ii:
     - i. Example Project Plan
     - ii. Example Weekly Status Report
     - iii. Recorded Training - During the deployment phase, customer success managers will record and make all training available to [Company Name]. Training is split into three parts: agent, admin, and supervisor.
3. Do you support a phased implementation? If yes, then describe the logistical considerations for a phased deployment. Specify the features/components that will be included in the initial roll-out and implementation.
4. Do you have your own Professional Service (PS) practice and Technical Service (TS) to implement your technology, or do you use PS/TS partners to implement? If you use partners please provide names and contact information.
5. Will a Program/Project Manager be assigned to manage the implementation?
6. What is the escalation process for resolving any conflicts or discrepancies in scope.
7. What [Company Name] team members will be required on the implementation project, for what percentage of time?
8. How many environments are provided (dev, staging, production) during implementation and on-going? What is the process to move configurations/code between environments? What is the process to refresh data between environments?
9. Describe your testing process including types of testing, methods for resolving discrepancies, and criteria for ensuring the testing is complete.

Support, Maintenance and Upgrades

1. Describe the ongoing relationship management between you and [Company Name]
2. How do we engage with your support team?
3. Please explain the flow of customer support when an agent needs same-day assistance?
4. Can you please provide SLAs on the past 6 months for same-day support follow up? and resolution times? Please explain company philosophy.
5. What is your SLA on accepting tickets submitted?
6. How do you prioritize and accept tickets based on severity? What is the SLA for each tier? What is your average resolution rate for each SLA tier? Please explain.
7. Do you have 24x7 live support options for post-deployment technical questions and issues?
8. Provide documentation on your support and training service offerings for both implementation and post deployment.
9. Are any fees required to obtain new releases?
10. How are new releases and changes tested? Are there provisions for either cloud or on-prem test environments?
11. Do you offer zero-downtime maintenance as a standard practice?
12. Please explain risk mitigation plans.
13. What is your fee structure for support? Please explain if recurring, usage based, or lump sum.
14. Please explain in detail the structure of your on-going post-sale support
15. Please describe in detail how many accounts each member of your support team handles?
16. What methods of communication do your support teams rely on with your clients? Phone, SMS, Chat, etc.
17. Please explain your support model - is it 24x7 follow-the-sun? Please explain your escalation path in detail.
18. Please explain your ticketing process - what is your SLA for response times to tickets? Is a managed services provider involved?
19. How is first-line support provided to your customer's agents and supervisors - do they reach out to your IT team or another internal resource? Please explain.
20. Is all support and service handled in-house? Please explain.
21. What is your CSAT rating for your support team?
22. Provide a list of ongoing trainings provided by supplier (can include industry conferences, video-led sessions, maintenance/product trainings). Please indicate which trainings are free vs. paid (and cost of trainings if paid).
23. Please describe the capabilities of your customer communities. To what extent can customers review product and service documentation, share problems and workarounds, ask questions and find answers, tricks and tips.

Architecture / Hosted Services
1. Describe your platform architecture and its benefits.
2. Is this technology SAML-compliant so that it can be integrated with the [Company Name] platform for identity management of [Company Name] users?
3. Describe, in detail, the user provisioning and de-provisioning features of your solution.
4. What is your overall system availability and response time SLA? How is it measured? Describe the types of real-time performance and availability monitoring, and how you monitor and manage SLA results?
5. Describe how High Availability (HA) is achieved with your product or service.
6. Describe how you provide geographic redundancy in your data center infrastructures.

7. The Contact Center Platform implementation is expected to be primarily, if not exclusively, hosted in the cloud. Please specify any hardware/software components that need to be installed on-premises.
8. If your service is delivered as SaaS, are you multitenant? Please describe.
9. Where is the platform hosted? Is it centrally hosted or geographically distributed? Please provide a map or list of data center hosting locations.
10. Do you have a status page where we can see the current state of the service and any service degradations or outages? Please include the link and provide the last six months of status details.
11. How many countries do you support? In how many countries do use more than one tier 1 carrier? Please specify any countries that are not available with your platform.
12. Does the vendor develop and maintain the platform solution in-house or does it resell another vendor's solution? Please elaborate if there is a local carrier partner involved.
13. Do you provide a Voice Quality SLA? Please explain and provide at least six months of history including global MOS, Jitter, Latency, and Packet Loss.

Security
1. Provide a data flow diagram that describes how data is processed and transferred through the system.
2. Describe the system architecture.
3. Provide Security Policy documentation to include disaster recovery, InfoSec policy, incident management, notifications, etc.
4. Provide third-party vulnerability scans and penetration test results from within the last 12 months.
5. Are you SOC I Type II compliant? SOC II Type II?
6. Please list all certification and regulatory compliance supported by your organization.
7. Describe the security and data integrity features of the system.
8. Does the system meet compliance regulations for data security? Will its functionality comply with governing acts at the federal, state, as well as international levels?
9. Please describe your capabilities for security of remote workforce in terms of threat detection and prevention, and authentication and identity management.

Privacy
1. Provide your Privacy Policy
2. Does your company follow GDPR standards?
3. Provide some information about what is done regarding GDPR compliance.
4. Do you have a Data Processing Agreement that can be signed for GDPR?
5. Is data processed or stored outside EEA?
6. If yes, what mechanisms are used to assure lawful transfer?
7. Are you HIPAA compliant? Do you have a BAA? Please explain.

Innovation
1. Please describe your feature/product update cadence and process. Is there any system downtime involved?
2. Please highlight all products, capabilities and services you've released in the last 24 months.

3. Are these products, capabilities, and services native to your platform or acquired via acquisition?
4. Please highlight your roadmap for the next 12 months.
5. Please describe your product vision

Feature Requirements

The following list of technical specifications constitutes the baseline functionality required from the Contact Center Platform solution.

GENERAL

1. Please name and briefly describe your flagship CCaaS solution.

2. Describe which products in your suite are natively built on a single platform, acquired, and partner/third party products.
    a. If acquired or partner products, describe in detail the level of integration to the core platform.
3. Describe the agent onboarding experience, including typical ramp time.
4. Describe how your platform supports adaptability, flexibility, and speed.

CRM/HELPDESK INTEGRATION REQUIREMENTS

1. Describe how Supplier offers the ability to integrate with [CRM Name] via screen pops.
2. Where is the CTI displayed on the computer screen?
3. Is it extensible/customizable?
4. Describe how Supplier offers auto-call logging with [CRM Name].
5. List common implementation time with [CRM Name]
6. Describe "call-routing" logic and integration with [CRM Name] routing logic.
7. Can your platform speak to custom objects and custom fields within the CRM system?
8. Can calls be routed based on CRM data? If yes, is this native to your platform? Will custom development be required? Please explain.
9. Please describe, for both inbound and outbound calls, your platform's ability to auto-create new records, populated with relevant details from call/caller with our CRM.
10. Define expected implementation time.
11. Describe any pre-built automations you have with our CRM.
12. How do you handle custom integrations?

13. Do you have a public API? Provide API documentation and specific examples of how your product API will meet our integration needs.
14. Can you support look up and identify by account/contact/lead phone number ("Caller ID") within [CRM Name]? Can you highlight if it is a VIP customer, name, and account when they call?
15. Please confirm and explain your platform's support for manual entry of customer ID or customer phone number in [CRM Name].
16. Please confirm and explain your platform's support for customer verification via designated "PIN" code within [CRM Name].
17. Describe the sync between your telephony platform and current business applications in scope.
18. Describe "Single-Sign-On" support for reps through [CRM Name] and other business applications.

ADDITIONAL OUT-OF-THE-BOX INTEGRATIONS
1. What additional out-of-the-box integrations does your platform provide to other business applications (e.g., Slack, MS Teams, WFM tools, etc)? Please list the applications and the respective levels of effort required for the integration to be enabled.

MARKETPLACE/PARTNER ECOSYSTEM
1. Does your platform have a partner ecosystem of additional functionality and offerings pre-integrated with the solution that we can add over time? Please explain the process of adding and implementing partner capabilities, including payment/provisioning.
2. How many partner applications are available through your marketplace? Please list the different categories of partner applications.
3. What percentage of your marketplace applications from third parties can be procured by customers through you?
4. What percentage of your marketplace applications can be downloaded and trialed by customers prior to purchase?
5. Please provide the url for access to your publicly available Application Marketplace.

TELEPHONY FUNCTIONALITY REQUIREMENTS
1. Describe capabilities for cold transfer, warm transfer, agent/customer interaction while on hold with alternate department/person.
2. Does your platform offer call recording capabilities? Where are the calls stored? How long can we retain our call recordings? Are there any fees associated with call recording storage?
3. Does your platform offer QA for call recordings?
4. What type of live monitoring capabilities does your platform offer?

ROUTING CAPABILITIES
1. Please summarize your Voice portal / Interactive Voice Response (IVR) offering, in particular the flow designer.
2. What skills are required to create and modify routing flows?

ARTIFICIAL INTELLIGENCE

1. Please summarize your application of Artificial Intelligence, Machine Learning and/or Natural Language Processing/Understanding functionality in the solutions you are proposing.
   a. What are the primary use cases?
   b. How are your AI models trained and maintained? By whom?

CUSTOMER SURVEYING - CSAT

1. What type of post-call survey functionality do you offer through your platform?
   Please explain the channels leveraged and the settings we can select from for frequency, etc.
2. What is the typical response rate you receive?
3. Can you customize the questions asked in the post-call survey?
4. How and where is survey data stored? Can we report on the results within our CRM?
   Please explain.
5. Can we set up triggers to alert management when poor survey results are submitted for follow-up? Please explain.
6. Can the surveys system adapt if you have more advanced survey needs?

ADMIN AND CONFIGURATION CAPABILITIES

1. How does an admin user make changes to IVR flows and configurations?
   Please provide a screenshot of the user interface and walk through the typical process.
2. How often is Professional Services from your company needed to help us make IVR configuration changes? How long does this typically take? What is the cost of supporting these changes?

REPORTING / ADVANCED REPORTING

1. Describe reporting capabilities, especially "real-time" call-center metrics and ability to integrate real-time data with CRM and other business systems (e.g., BI Tools, WFM Tools, Slack, etc).
2. Describe what KPI dashboards are native to your telephony solution and provide screenshots of the dashboards for Supervisors or Managers.
3. Please describe the process of building and running reports from a user perspective.

WFM/WFO

1. Is your WFM/WFO natively built on the platform you are proposing?
2. Does your WFM/WFO solution integrate out-of-the-box with your telephony platform? Please describe the implementation requirements and level of effort/time/resources required to execute.
3. Do you offer real-time agent status and schedule adherence monitoring? Does this integrate with Slack or any applications for notifications?
4. Please describe the capabilities to schedule and forecast on an hourly basis (by day of week) the call volume trends and staffing requirements.

5. Do you offer a portal where agents and supervisors can request, approve, collaborate on scheduling needs?

QM / SPEECH ANALYTICS
1. Does your platform offer voice analytics for call quality monitoring and coaching purposes? Please describe the capabilities of the platform and the integration into the telephony and/or CRM solution.
2. Do you offer any scorecard functionality for scoring and providing standardized feedback on call monitoring activity for agents? Please describe the capabilities and how it is integrated into the telephony platform.
3. What type of screen recording capabilities does your platform offer?

OMNICHANNEL
1. To what extent does the agent desktop support management of interactions consistently across channels, including email, social, text, chat and messaging?
2. Can interactions in digital channels be logged onto CRMs or other systems of record?
3. Is it possible to view team-wise trends of digital channels traffic and performance metrics in the form of visualizations?
4. Is it possible to trigger proactive web chat messages based on customer attributes like Current Page URL or Time Spent on Page, as well as HTML events such as On Click or On Change, directly on the business' website?
5. Is it possible to elevate a chat to a phone call?
6. Is it possible to manage queue priority based on predefined rules?
7. Can messages from customers be escalated automatically when they ares not responded to in a timely manner?
8. Is it possible to create templates so that agents don't waste time writing the same answers?

SELF SERVICE
1. How well does the CCaaS solution provide self service across touchpoints? What capabilities are there to utilize AI to enhance self-service capabilities?
2. Are self-service capabilities supported across all customer touchpoints?
3. Do applications (e.g., IVR flows) require professional services to create/modify or can administrators manage these changes independently?
4. Is additional self-service functionality available through your partner ecosystem?
5. Is data generated during self-service interactions automatically made available to agents when customers request live support?

AGENT VIRTUAL ASSISTANT
1. How does the solution support the development and implementation of an AI based agent desktop assistant?
2. Does the solution incorporate an embedded knowledge base to support the virtual assistant?

KNOWLEDGE MANAGEMENT
1. Please summarize your knowledge management offering.
2. Does the offering fully integrate with the CCaaS platform?
3. Does the offering seamlessly integrate with other contact center tools, such as agent assistants and virtual agents?
4. How does the offering leverage AI to assist authors in the creation and continuous improvement of articles?
5. Does the offering integrate with communities to quickly act on customer and agent feedback?
6. To what extent does the offering leverage natural language processing (NLP) to assist agents and customers in finding relevant knowledge quickly?
7. Does the offering provide the ability to clearly separate internal and external knowledge?

OUTBOUND
1. Please summarize your Outbound Dialing, including predictive, progressive and preview dialing offerings, including campaign management tools.
2. Please summarize your Outbound dialing, including predictive, progressive and preview dialing offerings, including campaign management tools.
3. Please summarize your proactive SMS notifications capabilities.

INDUSTRY SPECIALIZATION
1. What in-house expertise does your organization offer have for our industry?
2. What level of product functionality do you offer for our industry? (integrations, etc.)
3. What Services infrastructure do you offer for our industry? (communities, advisory boards, etc.)

REMOTE AND MOBILE AGENT WORKFORCE
1. Please describe how your platform supports remote/work-from-home agents.
2. Please summarize your mobile support capabilities for agents.

Cost

PRICING INSTRUCTIONS
Based on the information provided in this Request For Proposal, please provide your recommended system configuration, pricing, and any other relevant recommendations for your company.

The following items must be easily identified for analysis:
1. Recommended configuration and price (up front and recurring). Pricing should be inclusive of all VoIP Communications System services, licenses, and software, as well as any interface software required to the LAN, voice carriers, and EHR systems); and should clearly identify the cost of support and maintenance. If there is a step function in pricing, please be clear at what point each step occurs and what drives each pricing step.

2. The vendor is responsible for identifying and providing the functionality and cost of each line item. The vendor must identify both one-time non-recurring charges like implementation and setup fees as well as ongoing costs including but not limited to maintenance, support, licenses, and software upgrades.
3. Pricing must include installing and configuring all software proposed for your solution.
4. Please note your ability to meet the timeline for implementation as outlined in the implementation section.

COST VS BENEFIT ANALYSIS

Use this section of the RFP to identify ways your technology, people, and processes will help us create a business case. What are typical areas of inefficiency you see in contact center organizations prior to implementing your platform (e.g., manual processes around reporting, WFM and agent workflows; but we encourage you to get more granular than that)? How will your technology eliminate each inefficiency you see? How much time do you see your technology saving us with each inefficiency you identify? Please note which feature/capability you believe will eliminate each inefficiency you identify. In addition, please highlight any additional benefits your technology can provide beyond cost savings.

Vendor   References

Please provide three (3) existing customer references. Customer references will only be contacted during the final stages of the vendor selection process. [Company Name] will inform vendors of its intent to contact references before any such contacts are made.

COMPANY REFERENCE 1
Company Name   Insert Name
Company Address   Insert Address
Company Industry   Insert Industry
Company Contact   Insert Contact
Company Contact Email   Insert Email
Company Contact Telephone   Insert Telephone

Company Contact Title	Insert Title
How long on System?	Insert Duration

COMPANY REFERENCE 2	
Company Name	Insert Name
Company Address	Insert Address
Company Industry	Insert Industry
Company Contact	Insert Contact
Company Contact Email	Insert Email
Company Contact Telephone	Insert Telephone
Company Contact Title	Insert Title
How long on System?	Insert Duration

COMPANY REFERENCE 3	
Company Name	Insert Name
Company Address	Insert Address

Company Industry	Insert Industry
Company Contact	Insert Contact
Company Contact Email	Insert Email
Company Contact Telephone	Insert Telephone
Company Contact Title	Insert Title
How long on System?	Insert Duration