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1.0 Problem Statement

1.1 Deltek's strategy is to standardize and augment our existing worldwide Customer Care Telephony services. This RFP is an investigation of implementing that strategy.

1.2 Deltek's Customer Care team consists of multiple globally dispersed teams with analysts located both at Deltek facilities and their home offices.

1.3 Deltek's expectations for services are outlined in the table below:

Requirement	Addressed in Proposal
The system will be Web-based	Mandatory
The system will allow for Global Access.	Mandatory
The system will be Windows based and compatible with Windows XP and up, including Windows 7	Mandatory
The system will be compatible with Office 2007 and above	Mandatory
The system should be compatible with Microsoft Live Meeting	Mandatory
The system will be compatible with IE 7.0 and above	Mandatory
The system will be configurable and customizable by a Deltek administrator	Mandatory
The system will allow Deltek to establish our own phone tree (ie Skills Based Routing).	Mandatory
The system will allow the use of Interactive Voice Response (IVR)	Mandatory
The system will have the capacity to support an average of 10000 calls a month and will be scalable to accommodate growth in call volume	Mandatory
The system will support multiple methods of call initiation including but not limited to (Direct Calls, Chat, Voicemail, Callback, Web Callback, email and text interactions)	Mandatory
The system will allow for a user to submit a callback number, hang up and remain in queue. System will automatically call back user when their service wait is over.	Mandatory
The system will be able to support Email, Fax and Chat interactions	Mandatory
The system will allow supervisors to send broadcast messages to agents he/she oversees	Mandatory
The system has the capacity to record both inbound and outbound voice calls	Mandatory
The system will save calls in an industry standard audio file format with the ability to download and attach to RNT.	Mandatory
The system will be able to create multiple types of reports including canned, customizable and allow for adhoc reporting	Mandatory
The system will be able to integrate with Case Tracking, specifically RNT.	Mandatory
The system will support and record Voicemails	Mandatory
The system will be able to track, for reporting purposes, all incoming and outgoing call data	Mandatory
The system will allow Global Support to answer calls live both foreign and domestic.	Mandatory
The system will allow for both domestic and international analysts to answer calls without issue.	Mandatory
The system will allow for both onsite and remote users	Mandatory
The system will have secured access	Mandatory
The system will have the ability to support languages other than English	Mandatory
The system will be able to run while other programs are running	Mandatory

Requirement	Addressed in Proposal
The system will allow Deltek to record and upload its own menu options	Mandatory
The system will allow Deltek to remotely change recordings	Mandatory
The system will queue callers when an agent is unavailable	Mandatory
The system will provide call information about how many callers are in the queue ahead of them.	Mandatory
The system will allow Deltek to define agent groups	Mandatory
The system will support hold music	Mandatory
The system will support hold messaging and allow for multiple messages	Mandatory
The system will allow users to request forgotten username/password	Mandatory
The system will allow users to set their own passwords	Mandatory
The system will have an applicable online help system with search capabilities and an index	Mandatory
The system will support multiple numbers of entry into the system	Mandatory
The system allows for user to search an audio knowledge base while on hold.	Desired
The system will either pull up an existing user based on phone number called in on or create a new contact record.	Mandatory
The system will either pull up an existing open case based on phone number called in on or give the analyst the option to create a new case.	Mandatory
The system will allow for either touchpad or voice recognition for option selection	Desired
The system will be compatible with our Cisco Voice Solution	Mandatory
The system will have an uptime of 99.99%	Mandatory
The system will allow for administrators and supervisors to make changes to multiple accounts/technicians simultaneously.	Mandatory
The system will allow Global Support to operate as a unified entity	Mandatory
The system will allow Global Support to consolidate under a single toll free number for domestic calls	Mandatory
The system will allow for toll free to toll free routing of calls.	Mandatory
The system will be able to accept calls from international toll free numbers	Mandatory
The system will be able to route calls differently based upon the time of day	Mandatory
The system will be able to route calls to any valid phone number	Mandatory
The system will allow callers to input identifying data	Mandatory
The system will validate callers inputted data against the RNT database	Mandatory
The system will route calls based upon validated caller inputted data (ie Client Number, Case No.)	Mandatory
The system will change menu options based upon validated caller inputted data (ie Multi-Tier Support Offerings)	Mandatory
The system will route callers based upon tier and offering options	Mandatory
The system will route callers to numbers not a part of the call center solution (ie Collections, Sales, etc)	Mandatory
The system will pass user inputted data to the handling agent	Mandatory
The system will route calls based on skill level of the agent or by severity	Mandatory
The system will route live calls to logged in users using an IVR	Mandatory
The system will allow callers to return to the previous or main menu at anytime	Mandatory
The system will place callers in queues if agents are busy	Mandatory
The system will be able to prioritize clients in queue by status (SLA) and then by the order which the call was received	Mandatory
The system will be able to give callers different user inputted options based upon the estimated wait time or number of callers ahead of them in the queue.	Mandatory

Requirement	Addressed in Proposal
The system will allow callers to opt out of a queue	Mandatory
The system will allow users to transfer calls to any valid phone number	Mandatory
The system will allow multiple agents to conference in on a call	Mandatory
The system will record agents status	Mandatory
The system will automatically update an agent's status based upon the status of the agent's phone	Mandatory
The system will allow agents to set their own status	Mandatory
The system will be configurable so that the system administrator can define the user set statuses	Mandatory
The system will allow agents to initiate call recording	Mandatory
The system will support voicemail at the group level	Mandatory
The system will support voicemail at the agent level	Mandatory
The system will allow administrators to restrict agent access to assigned groups	Mandatory
The system will allow agents to belong to more than one group	Mandatory
The system will allow agents to see the queues they are a part of.	Mandatory
The system will allow agents to see the number of interactions in queue.	Mandatory
The system will allow agents to see the status of everyone in that queue.	Mandatory
The system will allow supervisors to monitor agents	Mandatory
The system will notify supervisors when workgroups have no available agents. Whether no one is logged in or free.	Mandatory
The system will allow supervisors to listen in on calls without the agent knowing	Mandatory
The system will allow supervisors to record calls without the agent knowing	Mandatory
The system will allow supervisors access to any recorded calls	Mandatory
The system will allow agents to be assigned to a supervisor or multiple supervisors	Mandatory
The system will only allow supervisors to actively monitor agents that are assigned to them	Mandatory
The system will support whispering by supervisors to agents (live coaching without the caller knowing)	Mandatory
The system will allow supervisors to view agent's screens	Mandatory
The system will allow supervisors to see an agent's status and the duration of that status	Mandatory
The system will allow supervisors to join a call	Mandatory
The system will allow supervisors to takeover a call	Mandatory
The system will allow supervisors to suspend an agent's access	Mandatory
The system will allow supervisors move agents to and from any of the workgroups they manage without having to get the Administrator involved.	Mandatory
The system will allow the Administrator to see the path the customer took to reach the analysts, VM, etc.	Mandatory
The system will allow for scheduled routing of calls based on callers support plan.	Mandatory
The system will integrate with RNT to identify caller, and based on support SLA direct them to either the self service support site if they have exceeded number of incidents or to an analyst.	Mandatory
The system will allow for a user to purchase additional support incidents via payment method over the phone.	Mandatory
The system will allow supervisors to run reports	Mandatory
The system will be configurable to allow certain reports to be run automatically	Mandatory
The system will send automatically generated reports to specified individuals	Mandatory

Requirement	Addressed in Proposal
The system will produce reports with customizable time integrals	Mandatory
The system will report at the group level on total incoming calls	Mandatory
The system will report at the group level on total outgoing calls	Mandatory
The system will report at the group level on total number of calls answered	Mandatory
The system will report at the group level on average wait time	Mandatory
The system will report at the group level on maximum wait time	Mandatory
The system will report at the group level on average call time	Mandatory
The system will report at the group level on maximum call time	Mandatory
The system will report at the group level on average hold time	Mandatory
The system will report at the group level on maximum hold time	Mandatory
The system will report at the group level on total number of calls abandoned	Mandatory
The system will report at the group level on average abandoned time	Mandatory
The system will report at the group level on maximum abandoned time	Mandatory
The system will report at the group level on average number of agents logged in	Mandatory
The system will report at the group level the average speed of answer	Mandatory
The system will report at the group level the average abandoned rate.	Mandatory
The system will report at the group level the number of missed calls (No Answer)	Mandatory
The system will report at the agent level on total outgoing calls	Mandatory
The system will report at the agent level on total calls abandoned	Mandatory
The system will report at the agent level on total talk time	Mandatory
The system will report at the agent level on total idle time	Mandatory
The system will report at the agent level on total hold time	Mandatory
The system will report at the agent level on total wrap-up time	Mandatory
The system will report at the agent level on total login duration	Mandatory
The system will report at the agent level the average speed of answer	Mandatory
The system will report at the agent level the average time to abandon for calls.	Mandatory
The system will report at the agent level the number of missed calls (No Answer)	Mandatory
The system will allow supervisors to create dashboard reports at the Multiple Tiered levels	Mandatory
The system will allow supervisors to create agent work schedules	Mandatory
The system will allow supervisors to create group work schedules	Mandatory
The system will make schedules visible to agents	Mandatory
The system will be able to interface with other reporting tools as required.	Mandatory
The data used for reporting will be updated at a minimum on a nightly basis	Mandatory

2.0 Instructions to Bidders

This section outlines instructions to bidders to ensure fair consideration of all invited vendors' proposals and to meet Deltek's timelines.

- 2.1** Deltek appreciates bidders' efforts in the preparation of their responses. Your response should be submitted to Lydia Rigsby, lydiarigsby@deltek.com in electronic format (Microsoft Word or PDF) no later than February 12, 2010 by 11:59 pm Eastern Time.
- 2.2** Proposals must follow all requirements dictated within this document.
- 2.3** Proposals received after the date specified in 2.1 will not be considered.
- 2.4** Any questions with completing this proposal, please contact Lydia Rigsby.
- 2.5** Contact with other Deltek team members is prohibited without prior authorization from Lydia Rigsby. Violations will result in disqualification.
- 2.6** If a response requires a reference to an external source, such as a whitepaper, Web site URL, service brochure and so on, this should be clearly indicated and accompanying material provided or an explanation of how the external source answers the question. If Deltek feels that the bidder response is difficult to understand, it could impact the bidder's chances going forward.
- 2.7** Bidders can, and are encouraged to, provide visual diagrams of their proposed solutions.
- 2.8** If a supplier wishes to propose additional services not specified in the RFP, they may do so; however, all core requirements of the RFP must be addressed in the proposal before additional services are considered.
- 2.9** If a vendor cannot provide a response or does not provide a service, the vendor should state this rather than leave the field blank.
- 2.10** Deltek may contact the bidder after proposal submittal for clarification of any information provided.
- 2.11** When completing the information request matrix, please provide documents as necessary to address any/all questions.
- 2.12** Financial information and references must be attached to the proposal.
- 2.12** Planned key milestones (times may be subject to change).
 - RFP issued to bidders January 29, 2010.
 - Vendor review and clarification period from February 1-February 10, 2010.
 - Vendor Clarification call on Thursday February 4th from 2-4:00pm Eastern Time
 - Bridge 1-866-766-9613
 - Participant Code 2919039
 - Proposal must be received by Deltek by 11:59 pm Eastern Time on February 12, 2010.
 - Proposal review by Deltek from February 15, 2010 to February 19, 2010.
 - Vendor Demonstrations if required February 22, 2010 through February 24, 2010.
 - Additional Due Diligence gathering February 25, 2010 through March 1, 2010.
 - Final selection by March 3, 2010.
 - Contract Negotiation March 4 through March 11, 2010.
- 2.13** Deltek shall not be responsible or liable for any costs incurred by the vendor in the preparation and submission of the bid and proposal.
- 2.14** All information contained in this RFP is considered to be the exclusive property of Deltek. Recipients of this RFP are not to disclose any information contained within this RFP unless such information is publicly available. This RFP is provided for the sole purpose of enabling the vendor to develop a response.
- 2.15** Vendors selected for presentations will be expected to provide an unprotected electronic copy of their services agreement and SLAs.

3.0 Rights

Deltek reserves the right to make the following decisions and actions based on its business interests:

- 3.1 Deltek can accept or reject any proposals without justification to the bidder.
- 3.2 Deltek can make an award to a bidder without discussion with other bidders.
- 3.3 Deltek can negotiate with one or more bidders.
- 3.4 Deltek can make split awards to more than a single bidder.
- 3.5 Deltek can choose or reject line item service or pricing elements.
- 3.6 Deltek will have no obligation to award a contract for work, goods and/or services as a result of this RFP.

4.0 Introduction to Deltek

4.1 Business description.

Deltek® is the leading provider of enterprise applications software designed specifically for project-focused businesses. For more than two decades, our software applications have enabled organizations to automate mission-critical business processes around the engagement, execution and delivery of projects. More than 12,000 customers worldwide rely on Deltek to measure business results, optimize performance, streamline operations and win new business.

4.2 Annual revenue.

- Deltek's annual revenue is in excess of \$290 million.
- For more information on Deltek, visit our Web site at www.deltek.com.

5.0 Current Environment

Deltek currently has 200 Agents and Managers. Combined with external departmental use, current seats would be minimally be sized at 225 with a forecasted 10% growth per annum.

Additionally, the Call Center software interfaces with the following applications:

- Cisco Unified Communications Manager 7
- Cisco Unity 7
- Blackberry Enterprise Server
- Postini
- Office Communications Server
- Right Now Technologies (RNT)

6.0 General Operating Guidelines — Deltek Expectations

5.1 Support of critical business systems.

- **5.1.1** The Customer Care telephony software is considered business-critical and must have a service level that meets/exceeds 99.9% accessibility and operability, 24/7/365.
- **5.1.2** We expect that the provider will proactively recommend changes and improvements to the environment to address ongoing application performance as specified; details to be completed in final negotiations of contract.
- **5.1.3** We expect all suggested or recommended sites for data center facilities to be in either the United States or a European country.

5.2 Disaster recovery.

- **5.2.1** The vendor partner is expected to provide full disaster recovery within four hours at a geographically separated location.
- **5.2.2** It is the responsibility of the vendor partner to provide the process, procedures and appropriate connectivity to ensure the seamless transition from the primary to backup site in the event of a disaster.

5.4 Proactive support for hosted solution.

- **5.4.1** The partner will conduct all day-to-day operating system and server maintenance tasks in accordance with industry best practice and/or software provider recommendations.
- **5.4.2** The partner will perform all day-to-day monitoring and reporting activities in accordance with industry best practice and/or software provider recommendations.

5.5 Relationship/service management.

- **5.5.1** The partner will provide clear identification and delineation of roles and responsibilities for day-to-day services and disaster recovery situations.

5.6 Connectivity.

- **5.6.1** The partner will provide sufficient bandwidth at the hosting facility to accommodate all routine traffic plus some percentage of spike activity (to be defined during contract negotiations).
- **5.6.2** The partner is expected to provide connectivity between Deltek sites and the data center as an extension of Deltek's network and not as a separately built and operated network. The partner will provide sufficient network failover capability.

5.7 Security.

- **5.7.1** The partner will provide adequate logical security to prevent access by non-authorized parties.
- **5.7.2** The partner will provide physically segregated and secure area for Deltek assets, allowing only authorized personnel to conduct business within/on Deltek systems.
- **5.7.3** The partner will provide user administration in accordance with Deltek's policy.

5.8 Facilities design/operations.

- **5.8.1** The partner will have industry standards, or better, in regards to data center power, heating/cooling, fire suppression and physical/logical security methods.
- **5.8.2** The partner will have data center facility staffed 24/7/365 with appropriate personnel to support the services being supplied.

5.9 Risk management.

- **5.9.1** The partner will have industry standard policy/procedure and methodologies to address all aspects of risk management including, but not limited to, economic, political and geographical aspects.

5.10 Project management.

- **5.10.1** The partner will have industry standard policy/procedure and methodology for project management.

Appendix A- Bidder Overview

A.1. Executive Summary

Describe how your solution will help us and why we should select your bid above others.

A.2. Company Background

Describe your company, what you do, how you do it and results you have achieved for other customers.

A.3. Company Ownership

Describe how your company is owned and financed. Describe any extended financial relationships, such as parent company, etc.

A.4. References

Provide three references for projects completed of a type and scope similar to our requirements. Include the following information: contract date & duration, company name, contact name, phone numbers, a brief description of the project and improvements that were achieved.

A.5. Product Strategy

Describe your product strategy and product plan for the next five years. Highlight any planned evolutions of current technology and provide a description of how future and current technologies will maintain compatibility and interoperability within your solution.

A.6. User's Group

Describe your User's Group, if any and include its purpose, meeting frequency and process for providing formal input to product development/enhancement and tracking of resulting developments.

Appendix B- Proposed Solution Description

B.1. Solution Architecture

- B.1.1. Provide an overview of the proposed solution architecture. Include an overview of the network, data and redundancy environment that we will require in order to realize enterprise class reliability and security for the proposed contact center solution. Please also include your experience in design, installation and support of this solution.
- B.1.2. Describe the technical architecture of the platform that will support the proposed solution.
- B.1.3. Describe the technical architecture of the networking, data and redundancy environment that will be necessary to realize enterprise class reliability and security for the contact center.
- B.1.4. What is the guaranteed level of system availability?
- B.1.5. To what extent is the proposed solution is based on open architecture and can be delivered via Software as a Service?
- B.1.6. State whether the proposed solution supports open standards and list the supported standards.
- B.1.7. How does the proposed solution provide encryption for voice over IP?
- B.1.8. How can SIP be deployed into the proposed solution architecture?
- B.1.9. How are technology partner products or services included and supported in the proposed solution?
- B.1.10. Is on-demand usage an option with the proposed solution? If yes, please include your standard on-demand pricing model and the time required for provisioning on demand services.

B.2. Network Operations and Management

Throughout this section, “network operations and management” refers to the network operations and management that will be necessary for us to have in place or to provision in order to realize enterprise grade reliability and security for the proposed solution.

- B.2.1. Describe the network operations and management that will be necessary to realize enterprise class reliability and security for the proposed contact center solution.
- B.2.2. Describe SAS70 certification factors for the network operations and management that will be necessary to realize enterprise class reliability and security for the contact center.
- B.2.3. Describe physical or logical data isolation factors for the network operations and management that will be necessary to realize enterprise class reliability and security for the contact center.
- B.2.4. Describe staffing requirements to support the network operations and management that will be necessary to realize enterprise class reliability and security for the contact center. Please include recommended controls, processes, and emergency backup procedures.
- B.2.5. Describe the level of battery and other electrical power backup for the network operations and management that will be necessary to maintain enterprise class reliability and security for the contact center, in the event of a complete local commercial power outage.

- B.2.6. In terms of the capacity of network operations and management, please recommend sizing parameters to ensure that our growth is not limited by power or equipment expansion factors.
- B.2.7. Recommend network operations and management processes for call allocation and routing to avoid potential “blockage” that would impact our contact center operations.
- B.2.8. Describe how the proposed solution operates with local dialing.
- B.2.9. Describe how the proposed solution operates with 911 services.
- B.2.10. Does the proposed solution support incoming call routing, transfers and station-to-station calling to our legacy systems?
- B.2.11. Describe how the proposed solution could support disaster recovery for emergencies occurring at any of our sites.
- B.2.12. Describe how the proposed solution could support on-the-fly call routing to work at home/remote agents if an emergency occurs at a call center site.

B.3. Security

- B.3.1. Describe any security management capabilities included with the proposed solution, and if they can be extended to the network and data operations that support the contact center.
- B.3.2. Describe any security auditing capabilities included with the proposed solution, and if they can be extended to network and data operations that support the contact center.
- B.3.3. Describe any unique physical security features that are included with the proposed solution, and if they can be extended to network and data operations that support the contact center.
- B.3.4. Describe to what extent the proposed solution can support HIPPA compliance, and if HIPPA compliance support can be extended to network and data operations that support the contact center.
- B.3.5. Does the proposed solution support self audits for HIPPA compliance or require a third party, and can these audits be extended to network and data operations that support the contact center?
- B.3.6. To what extent can the proposed solution support PCI (Payment Card Industry Data Security Standard) certification? Can this support be extended to network and data operations that support the contact center? Please state specific instances of the level(s) of compliance, method(s) used for auditing and compliance management and, if a third party firm has audited PCI compliance, for how long has the firm audited the proposed solution.
- B.3.7. Describe how the proposed solution includes comprehensive information-security policies and practices to deal with security threats that concern government entities and businesses, and if these practices can be extended to network and data operations that support the contact center.

B.4. Automatic Contact Distribution

- B.4.1. Describe the automatic contact distribution capabilities of the proposed solution

B.4.2 Customer Care in Queue

- B.4.2.1. Can the proposed solution playback pre-recorded messages to voice callers in queue?
- B.4.2.2. Can the proposed solution play music to voice callers in queue?

- B.4.2.3. Does the proposed solution support voice callers' participation in surveys while in queue?
- B.4.2.4. Can the proposed solution provide periodic updates of average wait time for voice callers in queue?
- B.4.2.5. Is the proposed solution able to provide callers with an option to be called back in the order their call was received rather than waiting on hold?
- B.4.2.6. Is the proposed solution able to offer choices to the caller while in queue, such as listen to a new offer description?

B.4.3 Routing

- B.4.3.1. Is the proposed solution able to support an unlimited number of configured agents?
- B.4.3.2. Is the proposed solution able to support an unlimited number of agent groups?
- B.4.3.3. Is the proposed solution able to support an unlimited number of queues and workgroups?
- B.4.3.4. Is the proposed solution able to support an unlimited number of routing schemes (i.e. statistical based, skill based, priority based, service level based, etc)?
- B.4.3.5. Is the proposed solution able to support an unlimited number of steps per routing scheme?
- B.4.3.6. Does the proposed solution support routing to a specific agent?
- B.4.3.7. Is the proposed solution able to weigh the "desire to use" factor for when certain agents are only meant for back-up situations?
- B.4.3.8. Is the proposed solution able to route contacts to remote agents?
- B.4.3.9. Does the proposed solution support ANI-based voice call routing/prioritization?
- B.4.3.10. Does the proposed solution support DNIS-based voice call routing/prioritization?
- B.4.3.11. Can the proposed solution provide an unlimited number of DNIS and ANI codes that may be configured for routing purposes?
- B.4.3.12. Does the proposed solution support ANI-and/or DNIS-based data matching with voice call routing based on results of the data match?
- B.4.3.13. Does the proposed solution allow contacts to be routed to the last agent the caller spoke with on a prior call?
- B.4.3.14. Is the proposed solution able to place other contacts such as e-mail, fax, or chat, into the same queue?
- B.4.3.15. Is the proposed solution able to apply the same set of routing rules to all contact types?
- B.4.3.16. Does the proposed solution allow different types of contacts to be assigned different processing priority levels in the queue?
- B.4.3.17. Can the proposed solution allow contacts to be queued for multiple groups of agents simultaneously?
- B.4.3.18. Is the proposed solution able to provide supervisors with a visual indication of the contact type in the queue?
- B.4.3.19. Is the proposed solution able to provide supervisors with a view of the contact type an agent is working on as well as how long they have been working on it?

- B.4.3.20. Does the proposed solution employ a true “virtual queue” as opposed to overflowing calls between various queues and call center locations?
- B.4.3.21. Can the proposed solution review status of queues before actually directing a contact into the queue?
- B.4.3.22. Can the proposed solution route overflow contacts to a different queue or skill level?
- B.4.3.23. Can the proposed solution overflow contacts to an alternate contact center?
- B.4.3.24. Does the proposed solution support re-routing based on real time conditions such as traffic levels, average hold time, average contact time, and time of day/day of week/holiday? (“inter-flow”)
- B.4.3.25. Does the proposed solution support re-routing based on predictive logic, last agent routing, routing based on circumstances?
- B.4.3.26. Does the proposed solution provide a monitoring tool, which allows supervisors and business manager’s real-time visibility to how contacts traverse through a routing strategy?
- B.4.3.27. Can the proposed solution allow supervisors to create their own routing strategy as business conditions change?

B.4.4. Skills Based Routing

- B.4.4.1. Is the proposed solution able to support skills based routing?
- B.4.4.2. Does the proposed solution allow an unlimited number of agent skill types to be configured within the system?
- B.4.4.3. Does the proposed solution allow an unlimited number of skills to be assigned to an agent?
- B.4.4.4. How many skill proficiency levels can be assigned within the proposed solution?
- B.4.4.5. Does the proposed solution allow skills to be prioritized or weighted?
- B.4.4.6. Does the proposed solution allow skills to be assigned to other contact types such as e-mail, chat, fax, and voice-messages?
- B.4.4.7. Can an agent automatically inherit skills from the ACD?
- B.4.4.8. Can an agent’s skill be temporarily disabled without having to remove then re-add the skill?
- B.4.4.9. Can the proposed solution provide the capability to establish routing rules regarding the number of simultaneous contacts (all channels) that an appropriately skilled agent may process?
- B.4.4.10. Is the proposed solution able to route a voice call to an agent who is working on an e-mail draft if unsatisfactory service levels now need to consider this agent skilled for the routing target range?
- B.4.4.11. Is the proposed solution able to consider skill/skill proficiency levels and call treatments based upon IVR options selected?
- B.4.4.12. Does the proposed solution provide a single source for supervisors to manage skills-profiles for agents in all contact types, such as voice, fax, e-mail, and chat?

B.4.5. Real-Time Queue Monitoring and Supervisor Handling

- B.4.5.1. Can supervisors and/or agents see a detailed list of agents by workgroup and view their present status?

- B.4.5.2. Does the proposed solution provide basic summary information regarding the number of agents logged in, number on inquiry, etc?
- B.4.5.3. Does the proposed solution provide the ability for supervisors to view workgroup statistics in real-time, including following attributes: service level, longest call waiting, abandoned calls, statistics for current shift, statistics for previous shift, etc?
- B.4.5.4. Can alerts be set on each monitored value to watch certain condition (i.e. longest call waiting, object has not been handled within service specification for the specific interaction type)?
- B.4.5.5. Can alerts trigger the following: display a color change in value; a pre-defined sound; display a predefined icon; execute an application; or activate an external alert (send a page, send an e-mail, send a fax, etc)?
- B.4.5.6. Can supervisors monitor all configured workgroups?
- B.4.5.7. Can supervisors monitor all contact types processed by different workgroups?
- B.4.5.8. Are agent status indicators configurable?
- B.4.5.9. Can a particular agent be selected to view or listen to specific calls?
- B.4.5.10. Can supervisors and/or agents view detailed information regarding calls in queue such as caller name, caller ID, duration of call, etc?
- B.4.5.11. Can supervisors and/or agents view real-time information on desktop for queue status?
- B.4.5.12. Can supervisors be alerted of all new objects in the queue and choose to: listen” to the call or chat?
- B.4.5.13. Can supervisors continuously monitor a selected line, agent, or workgroup?
- B.4.5.14. Can supervisors and/or agents initiate on-demand recordings of calls (multiple calls)?

B.4.6. ACD Administration

- B.4.6.1. Does the proposed solution have a single interface for adding lines, workstations, ACD agents, and supervisors?
- B.4.6.2. Is the proposed solution easy-to-use for quickly performing simple moves, adds, and changes?
- B.4.6.3. Can groups of agents be defined through a single workgroup configuration?
- B.4.6.4. Can agents, team leaders, and supervisors be given different access levels (i.e. viewing real-time queues vs. moving calls in and out of queues)?
- B.4.6.5. Can administrative roles be created easily to assign rights to a given workgroup or a given user?
- B.4.6.6. Is the administration tool available via any web interface (i.e. from any workstation)?

B.5. Agent Interface

- B.5.1. Provide graphics that represent the basic soft phone functionality.
- B.5.2. Describe the agent soft phone features included or available in the proposed solution.
- B.5.3. Does the proposed solution offer a single agent sign on for all applications?
- B.5.4. Does the proposed solution offer Agent Statistics (to the agents)?
- B.5.5. Does the proposed solution offer Contact information associated with the interaction?

- B.5.6. Specify the model and basic features of any hard phone included in the proposed solution

B.6. Work at Home Agents

- B.6.1. Does the proposed solution support work at home agents with the same technology as on site agents?
- B.6.2. Describe the proposed solution's work at home agent desktop technology for accessing our hosted systems.
- B.6.3. Describe transmission between the proposed solution, the work at home agent and our network.
- B.6.4. How does the proposed solution authenticate work at home agents?
- B.6.5. Does the proposed solution require special encryption measures for work at home agents?
- B.6.6. How does the proposed solution provide security for applications that work at home agents must be able to access?
- B.6.7. Does the proposed solution support SIP-based presence for work at home agents?
- B.6.8. Does the proposed solution allow us to choose the work at home agent desktop hardware and connectivity? If yes, what are the work at home agent desktop specifications?
- B.6.9. If the proposed solution includes the desktop hardware for work at home agents, how is that desktop locked down?
- B.6.10. Specify the work at home agent desktop configuration requirements for operating with the proposed solution.
- B.6.11. Describe the proposed solution's network connectivity options and specifications for work at home agents.
- B.6.12. Describe any requirements for network services on site (in the home) for work at home agents, including responsibilities and costs.
- B.6.13. Does the proposed solution provide network monitoring to work at home agents?
- B.6.14. Does the proposed solution provide call reporting and security monitoring for work at home agents?
- B.6.15. Are the proposed solution's work at home agent reports different from any other "agent" and or supervisor reports?
- B.6.16. Can the proposed solution support recording and monitoring of work at home agents?

B.7. Interactive Voice Response

- B.7.1. Does the proposed solution include automated attendant and multi-level menu functionality?
- B.7.2. Does the proposed solution support customized prompting, such as choice of language?
- B.7.3. Does the proposed solution support multiple languages?
- B.7.4. Is the proposed IVR solution available 24 X 7?
- B.7.5. Does the proposed solution support Fax on Demand / Fax-Back?

- B.7.6. Does the proposed solution utilize pre-recorded vocabulary to respond to caller requests?
- B.7.7. Does the proposed solution include IVR call tree design, scripting and recording services?
- B.7.8. Does the proposed solution's IVR allow authorized our staff to change IVR scripting?
- B.7.9. Does the proposed solution's IVR automated attendant support cross menu trees?
- B.7.10. Does the proposed solution support speech recognition technology? Is this technology provided via partnership?
- B.7.11. Does the proposed solution support time of day, day of week and holiday greetings?
- B.7.12. Does the proposed solution include the concept of a scheduler or the ability to trigger applications based on variable data?
- B.7.13. Can the proposed solution transfer calls to our legacy systems? (such as Avaya, Nortel or Cisco)
- B.7.14. Does the proposed solution support seamless call delivery to either IP or non-IP systems?
- B.7.15. Does the proposed solution support WAV and MP3 audio file formats?
- B.7.16. Describe the pricing for both new IVR call flows and IVR redesigns.

B.8. Computer Telephony Integration – CTI

- B.8.1. Describe the integration capabilities of the proposed solution.
- B.8.2. Describe how the proposed solution would integrate to multiple databases, based on call information such as ANI or DNIS or caller input such as case or ID, in a way that will deliver combined data “screen pops” to an agent desktop as the agent receives the call.
- B.8.3. Does the proposed solution support simultaneous transfer of a voice call and its related data between agents?
- B.8.4. Describe how the proposed solution supports TAPI, TSAPI, and CSTA standards.
- B.8.5. Can the proposed solution extend CTI capabilities to support multi-channel interactions?
- B.8.6. Does the proposed solution extend CTI capabilities to support social media technologies?

B.9. Customer Relationship Management – CRM

- B.9.1. Describe how the proposed solution would provide or support CRM.
- B.9.2. Does the proposed solution offer any unique capabilities compared to other CRM solutions?
- B.9.3. Specify the major CRM products with which the proposed solution can or has successfully integrated.

B.10. Workforce Management – WFM

B.10.1 Historical Data

- B.10.1.1 What historical data is provided by the proposed solution for analysis?
- B.10.1.2 In what increments are statistics stored?
- B.10.1.3 How long is historical data stored?
- B.10.1.4 Can the historical data be imported?
- B.10.1.5 Can skills be consolidated for historical analysis?
- B.10.1.6 If historical skill data can be consolidated, is there a limitation to the number of skills that can be consolidated for analysis?

B.10.2 Forecasting

- B.10.2.1. How many unique forecasting engines does the proposed solution allow supervisors to utilize?
- B.10.2.2. Describe special functionality for forecasting non-call related transactions.
- B.10.2.3. Can forecasted requirements for non-phone transactions be spread across week boundaries? (i.e. weekends Sat, email service level is 100% in 48 hours, and headcount automatically carries over into Sun)?
- B.10.2.4. Does the proposed solution forecast transaction volume, average handle time and agents required by interval?
- B.10.2.5. Can the proposed solution generate a forecast of more than 1 week without forecasting 1 week at a time?
- B.10.2.6. Can the proposed solution automatically distribute headcount forecast across multiple virtual sites?
- B.10.2.7. In a skill based routing environment, can the proposed solution display headcount required without generating a schedule? (i.e. long range forecast)
- B.10.2.8. List the variables that are available for forecasting. (i.e. Service Level, Calls, AHT, Max OCC, Budget/Shrinkage Factors, etc.
- B.10.2.9. Does the proposed solution allow supervisors to employ unique overhead values (shrinkage), by time of day, day of week?
- B.10.2.10. Does the proposed solution support intra-day forecasting?
- B.10.2.11. Can supervisors modify a forecast using a graphic interface?
- B.10.2.12. Does the proposed solution support cost forecasting features?
- B.10.2.13. Can a forecast be regenerated after a schedule has been produced?
- B.10.2.14. Can a regenerated forecast reference current day trending to determine a more accurate forecast?
- B.10.2.15. Does proposed the solution provide workforce management functionality for multimedia (non telephony) contacts? Does this require the purchase of a separate module? Is there custom interface development required?
- B.10.2.16. Does the proposed solution provide forecasting, scheduling, and real-time adherence for email?

B.10.3. Special Forecast Considerations

- B.10.3.1. Explain special functionality available to forecast for “Special Events” (i.e. Catalogue drop will create significantly increased call volume which gradually diminishes over a six week period)
- B.10.3.2. Does the proposed solution have the ability to define a special event intra-day? (i.e. center will receive increased call volume for a few hours due to a television advertisement.)
- B.10.3.3. Explain the how the proposed solution can use specific historical data to influence future forecast events with variable modifiers across a day or date range or time period. (i.e. if 10,000 catalogues created an impact of X across a 10-day period, then what is the impact when 50,000 similar catalogues are sent?)
- B.10.3.4. Explain how the proposed solution is capable of excluding specific time, date or date range intervals from inclusion in normal forecasting considerations.

B.10.4. Scheduling

- B.10.4.1. Does the proposed solution support agents working multiple skills simultaneously?
- B.10.4.2. Does the proposed solution support agents working multiple skills exclusively?
- B.10.4.3. Does the proposed solution support a blend of the two approaches? (i.e. Blended calls, but switch to exclusive emails for 1 hour, the back to blended calls)
- B.10.4.4. Does the proposed solution support agent skill proficiency ratings to ensure that agents that are not adequately skilled are not scheduled to work certain activities?
- B.10.4.5. Does the proposed solution allow supervisors to schedule individual sites based upon a virtual headcount forecast?
- B.10.4.6. How many lunch / breaks (paid or unpaid) can be defined in a daily shift?
- B.10.4.7. Can supervisors control break periods and define acceptable time ranges for breaks to be scheduled?
- B.10.4.8. Can an agent be scheduled to perform different specific skills/activities during the same day at different times?
- B.10.4.9. Can supervisors control the duration of time that an agent may be automatically scheduled alternate forecasted activities? (i.e. don't give agent exclusive email time in less than a 1 hour block.)
- B.10.4.10. How are known changes to the schedule incorporated before the scheduled week?
- B.10.4.11. How are exceptions to the schedule incorporated during the scheduled week?
- B.10.4.12. Can the proposed solution generate a schedule that guarantees agents are available for specific exceptions without manipulating the agent's available working hours? (i.e. we want 10 agents available for a meeting at 2:00 PM; make sure that they are scheduled to work a schedule that overlaps the meeting time.)
- B.10.4.13. Can the proposed solution determine which agents are willing to work overtime?
- B.10.4.14. Can the proposed solution automatically schedule overtime, if so, how?
- B.10.4.15. Does the proposed solution accommodate employees who work Fixed Schedules?
- B.10.4.16. Can fixed schedules be accomplished without having to restrict agent availability to a range so narrow that it is the only schedule that they can work?

- B.10.4.17. Can multiple agents be assigned to the same fixed schedule definition to reduce manual data entry?
- B.10.4.18. How many fixed schedules does the solution support?
- B.10.4.19. Can supervisors rotate fixed schedules?
- B.10.4.20. How many unique weeks can be included in a rotating schedule?
- B.10.4.21. Does the proposed solution account for agents working multiple skills simultaneously when using fixed schedules?
- B.10.4.22. Do fixed schedules allow the ability to assign agents to work specific skills on specific days?
- B.10.4.23. Can schedules be created to adhere to daily and weekly employee requirements? (i.e. Must work 6-8 hours per day and 38-42 per week)
- B.10.4.24. Can schedules be created to adhere to Calendar Monthly employee requirements without manual intervention? (i.e. Agent must work 120 hours per calendar month)
- B.10.4.25. How does the proposed solution handle day off equalization (i.e. weekend rotation)?
- B.10.4.26. How far in advance may unique weekly schedules be produced during a single schedule run?
- B.10.4.27. Can the number of agent positions available be a schedule criterion?
- B.10.4.28. Assuming that the system solution is configured correctly, will there ever be agents that do not receive schedules?
- B.10.4.29. Is employee preference considered as a part of the scheduling process?
- B.10.4.30. Can agent's request preferences other than just start time?
- B.10.4.31. Are agent preferences able to be completed by agents through a web interface entry?
- B.10.4.32. Can agents be scheduled for a skill that encompasses multiple sites?

B.10.5. Meeting Scheduling

- B.10.5.1. Explain how the proposed solution can automatically create meetings at the best possible times for groups of agents that I select.
- B.10.5.2. Can the supervisor exclude specific times and days from inclusion in possible meeting times?

B.10.6. Vacation Planning

- B.10.6.1. Explain how the proposed solution can automatically accrue vacation time for agents.
- B.10.6.2. Can the proposed solution account for different accrual rules for different types of agents? (i.e. Full time, Part time)
- B.10.6.3. How does the proposed solution allow supervisors to determine the maximum allowable vacation slots per day?
- B.10.6.4. Can vacation slots be determined by supervisors rather than based upon activity type?
- B.10.6.5. Does the proposed solution have a facility by which agents may be automatically granted vacation days without supervisor intervention?

B.10.7 Supervisor and Agent Interface to Workforce Management

- B.10.7.1. What specific functionality is available via the web interface for agents?
- B.10.7.2. Can agents request specific vacation days through the web interface?

- B.10.7.3. Does the proposed solution support agent preference scheduling through the web interface?
- B.10.7.4. Does the proposed solution support agent shift bidding through the web interface?
- B.10.7.5. What specific functionality is available via the web interface for supervisors?
- B.10.7.6. Does the proposed solution display intraday performance information updated in real-time including graphical displays and trending?
- F.10.7.7. Does the proposed solution allow supervisors to print web reports?
- B.10.7.8. Does the proposed solution allow supervisors to email web reports?

B.10.8 Adherence

- B.10.8.1. Can the proposed solution compare individual agent status to respective individual schedules on a real-time basis?
- B.10.8.2. Does the proposed solution provide real-time adherence information for non-phone contacts such as email?
- B.10.8.3. Can the supervisor modify historical adherence information to correct compliance issues that are not the agent's fault? (i.e. supervisor forget to plug in meeting, agent appears to be out of adherence)
- B.10.8.4. Is real-time adherence information available through a web interface?

B.11. E-Learning

- B.11.1. Describe how the proposed solution would provide or support e-Learning capabilities.
- B.11.2. Does the proposed solution provide the same or different e-Learning capabilities for work at home agents as for onsite agents?
- B.11.3. Describe how the proposed solution would support e-Learning coaching using audio and video, inserting call snippets, documents and "real" call transcripts.
- B.11.4. Does the proposed solution support compatibility with SCORM (Sharable Content Object Reference Model)?
- B.11.5. Does the proposed solution support modularity in creating, delivering and scoring review quizzes for incremental (progressive) learning assessment?
- B.11.6. Describe how the proposed solution would provide or support e-Learning Reporting capabilities.

B.12. Recording and Monitoring

- B.12.1. Describe how the proposed solution would provide or support contact recording and monitoring.
- B.12.2. Can the proposed solution support full time recording of audio interactions and both selective and full time recording of data (screen capture)?
- B.12.3. Does the proposed solution provide for recording of both inbound and outbound agents?
- B.12.4. Does the proposed solution provide call recording at pre set times and also on supervisor demand?
- B.12.5. Does the proposed solution provide agents the ability to record on demand?
- B.12.6. Does the proposed solution support identifying specific calls so recordings of those calls cannot be purged?

- B.12.7. Does the proposed solution support searching contact recordings by agent, ANI, time (includes date) or a combination of these?
- B.12.8. Does the proposed solution support media player applications such as Windows Media player?
- B.12.9. Does the proposed solution support scheduled and automatic purging of contact recording based on call identifiers?
- B.12.10. For what length of time can the proposed solution store contact recordings?
- B.12.11. Does the proposed solution support audio files storage formats such as WAV or MP3?
- B.12.12. Does the proposed solution provide encrypted storage for quality monitoring voice and screen capture data?
- B.12.13. Does the proposed solution include secure offsite storage of contact recordings?
- B.12.14. Does the proposed solution's call recording capability support centralized operations reporting of both the proposed solution and other systems?
- B.12.15. Are report screens pre-defined, customizable or both?
- B.12.16. Does the proposed solution support agent scoring with forms templates and context-sensitive evaluation tools?
- B.12.17. Does the proposed solution support role-based scorecards?
- B.12.18. Does the proposed solution require configuration of reporting and monitoring for each site?
- B.12.19. Does the proposed solution support sharing a system among multiple sites to leverage recording and monitoring capabilities? If so, what are expansion limits?

B.13. Reporting

- B.13.1. Describe how the proposed solution provides real time, summary and historical reports and graphs of contact center operations.
- B.13.2. Does the proposed solution's reporting capability support cradle to grave reporting data and views of all customer interactions across the enterprise?
- B.13.3. Does the proposed solution's reporting capability support Web-based operational dashboards to monitor queues, teams, group, sites and lines of business?
- B.13.4. Can reports be run at any agent or supervisor workstation?
- B.13.5. Does the proposed solution's reporting capability require our IT staff for designing initial dashboards or reports?
- B.13.6. Can the proposed solution's dashboards be customized to include our own Key Performance Indicators, goals and alert levels?
- B.13.7. Does the proposed solution allow changes to dashboards after implementation? Please include any costs involved in dashboard changes after implementation.
- B.13.8. Please describe standard reports and customization options included with the proposed solution.
- B.13.9. Does the solution provide up-to-the-minute reports available for queues, workstations, agents, and lines without negatively impacting real-time processing of contacts?
- B.13.10. Specifically, how frequently can the proposed solution refresh data?

- B.13.11. Does the proposed solution allow standard and custom reports to be scheduled and run automatically?
- B.13.12. How many simultaneous supervisors can view multiple operational reports?
- B.13.13. List the open database formats, at the level of Microsoft ODBC, Adobe PDF or ASCII text, in which the proposed solution can save reporting data.
- B.13.14. Can reports be converted to HTML format and made available via our company intranet?
- B.13.15. Can reports be printed on any network printer?
- B.13.16. Can reports be faxed/ e-mailed to remote managers?
- B.13.17. Does the proposed solution allow supervisors to save report designs, including for customized reports, to run the reports in the future?

B.14. Implementation

- B.14.1. Describe what will be included in implementation.
- B.14.2. Based on implementations similar to the proposed solution, please provide an estimate of customer Contact Center and IT staffing and any other resources that will be required to implement the proposed solution, except the IVR.
- B.14.3. Provide an implementation process overview including process tools and staffing commitments from both our company and your team.
- B.14.4. Who provides the lead project manager responsibility for the complete implementation process?
- B.14.5. Based on implementations similar to the proposed solution, how long does your lead project manager typically remain involved after implementation?
- B.14.6. Describe all levels of pre-cutover testing included in the proposed solution.
- B.14.7. What is the process for managing unpredictable integration issues that may arise with the proposed solution?
- B.14.8. Do you provide post-implementation operational support for modification to the solution?
- B.14.9. Describe the time requirements to add agents to the proposed solution.
- B.14.10. Based on IVR implementations similar to the proposed solution, provide an historic average of customer IT and Contact Center staffing and other resources required to design and implement the solution.
- B.14.11. Does IVR design and implementation include any partners? If so, please indicate each partner and their role(s).

B.15. Change Management

- B.15.1. Based on implementations similar to the proposed solution, please provide yearly estimates of customer IT and Contact Center staffing and other resources we should anticipate for change management.
- B.15.2. Does the proposed solution include a change management system designed specifically for the solution?
- B.15.3. Is the proposed solution's change management system an internally created product or a partner product?

- B.15.4. Does the proposed solution's change management system provide weekly, monthly or quarterly reports?
- B.15.5. Describe your pricing model for our initiated changes to the proposed solution.
- B.15.6. Describe how we will be informed of pending updates or upgrades for the proposed solution and any measures provided to ensure there is no disruption during upgrades.
- B.15.7. Based on implementations similar to the proposed solution, provide estimates of the effect of change implementation or required upgrades on service levels.

B.16. Operational Support, Maintenance and Remote Monitoring

- B.16.1. Describe any operational support, maintenance and monitoring included with the proposed solution.
- B.16.2. Describe the functionality that will be included in operational support, maintenance and monitoring.
- B.16.3. Does the proposed solution include access to a 24 x 365 Help Desk? If yes, which issues can this Help Desk support?
- B.16.4. Describe service request, problem reporting and escalation processes included with the proposed solution.
- B.16.5. For service requests and problem reporting, provide a copy of your standard problem classification model and commitment to response and resolution by classification.
- B.16.6. Does the proposed solution include monthly or weekly reports of customer service requests, problem reports, escalations and impact on system availability?
- B.16.7. Does the proposed solution include a process for notifying customers of alerts and alarms associated with the proposed solution, including documentation, triage, escalation and customer resolution? If yes, please describe the process.
- B.16.8. If it is necessary for you to schedule maintenance of the proposed solution, how do you notify customers?
- B.16.9. If it is necessary for you to schedule maintenance of the proposed solution, what is your process for testing the system after maintenance and what time will be required of our IT and contact center staff for this testing?
- B.16.10. Provide a copy of your standard Service Level Agreement.

Appendix C- Pricing

C.1. Describe your pricing model and any applicable discounts.

- C.1.1. Can the proposed solution be priced based upon total agent seats if each site requires different applications specific to the projects at that site?
- C.1.2. How would discounts apply?
- C.1.3. Would Call Recording be priced based on the number of sites or the number of agents for whom Call Recording is in use?
- C.1.4. Can we lock in pricing for future growth? If so, for how long?
- C.1.5. Provide post implementation pricing for growth of existing sites.
- C.1.6. Provide post implementation pricing for new sites with no other equipment in place.
- C.1.7. Will the price per active agent be affected if we reduce the number of agents in future years?
- C.1.8. Will you repurchase hardware directly replaced by the proposed solution?
- C.1.9. Provide pricing for IVR design, development, testing and implementation.
- C.1.10. Provide pricing for CTI design, development, testing and implementation.

Appendix D Supplemental Materials

D.1. Provide copies of the following:

- D.1.1. Standard Purchase Agreement
- D.1.2. Standard Maintenance Contract
- D.1.3. Support Offerings
- D.1.4. Product Brochures
- D.1.5. Quick Reference and User Guides



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