**Request for Proposal Template**

# Hosted/Cloud UnifiedCommunications and Collaboration Solution

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# Hosted/Cloud Unified Communications and Collaboration Solution

**RFP Request**

## Instruction Sheet

1. There are instructions within the RFP that provide guidance for that specific section or are marked within <brackets> and use *italics print style*. After each section is completed accordingly, these instructions statements should be removed.
2. Using a global "find and replace," insert the name of the organization submitting the RFP wherever the RFP uses *<Organization Name>*.
3. Other unique details that need to be replaced with specific information are also shown within brackets and italicized.
4. Within the RFP document are a wide range of potential features and functions that may be needed. If such an item does not apply to your specific needs and requirements, it can be removed or defined differently if needed.
5. Section 6.1 and 6.2 are intended to provide the size for initial quote and the planned deployment of services. These quantities should reflect actual needs because it will drive the pricing.
6. After completing the RFP, right button click on the Table of Contents and update the entire table to introduce any changes to section titles and page numbering.

## About the Author

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COMgroup, Inc. is an independent consulting firm providing strategic planning, requirements definition, system design, business process analysis, procurement, and project management services for all types of voice, data, and video communications technologies. We focus on engaging and educating our clients while we analyze workflow and communications, with a goal of improving performance regardless of the underlying technical components. You can learn more about COMgroup at www.comgroup-inc.com.

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<Organization Logo>

Request for Proposal Template

# Hosted/Cloud Unified Communications and Collaboration Solution

Date Due: <Month, day, year> at <time>

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# Hosted/Cloud Unified Communications and Collaboration Solution

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## Section 1 – Project Overview

### 1.1 Introduction to <Organization Name>

<Typically used to provide background information on the nature of the business and the overall size (number of locations, number of employees, geographic footprint, etc.). May also include anything that makes the organization different, such as specific business philosophy.>

### 1.2 Project Description

<Organization Name> is soliciting proposals for a hosted or cloud-based unified communications and collaboration solution to <describe purpose and scope>.

For purposes of this Request for Proposal (RFP), the terms “Communications as a Service” (CaaS), “hosted,” and “cloud-based” may be used interchangeably. Note that the RFP includes collaboration, and the use of CaaS is not intended to exclude any functionality.

Upon completion of the RFP process, <Organization Name> intends to contract with the selected Vendor that best meets its needs. Vendor proposals must include application software; professional services, including implementation and training; and any required on-premises equipment. Vendor proposals must also include ongoing management, monitoring, and support, and must also meet the technical and functional requirements described on the following pages.

### 1.3 Terms and Definitions

For the purposes of this RFP, the following terms and definitions are used to help define the roles involved in producing the solution:

a. Vendor: The proposing firm that is responsible for the solution. For purposes of this RFP, the terms Vendor, Proposer, and Contractor may be used interchangeably, although Proposer is limited to referencing potential Vendors (pre-award) and Contractor is specifically referencing the awarded Vendor.

b) Manufacturer(s): The company or companies that make the solution components and provide the Vendor with technical support and upgrades to the underlying systems.

c) Service provider: The firm supplying the carrier services elements, although this may be the same company that is the Vendor in some situations.

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## 1.4 Minimum Requirements

<Organization Name> requires, at the time of submission, that the proposing Vendor and the proposed products meet the minimum requirements listed in Section 1.4.1. Proposals may be rejected by <Organization Name> if these requirements are not met.

### 1.4.1 Vendor Requirements

1. Vendor has been an authorized distributor of the proposed cloud-based solutions for a minimum of six months and preferably one year or more. The Vendor must have full authorization and support from the manufacturer of the core solution.
2. Vendor must employ (have on direct payroll or contract) a minimum of two software engineers certified on the proposed core products.
3. Vendor is authorized to do business in <insert locale as appropriate> and has, or will obtain, the necessary licenses, registration and permits.

### 1.4.1 Vendor Requirements

Proposals must include all of the elements required for the solution, even if multiple entities are included in the product mix. The proposing Vendor (i.e., the prime contractor) must provide a coordinated project plan that includes the total solution, identifies all components that are provided by others, and act as the primary point of contact for the proposal, while providing contact information for the others in Section 3.1. Ideally the proposing Vendor will be able to deliver all products that make up the entire solution and minimize the use of third-party elements in the solution.

## 1.5 Preliminary Calendar

<Organization Name> has established the following anticipated sequence of events and tentative schedule dates for this procurement process. All dates set forth in the table below are subject to modification at the sole discretion of <Organization Name>.

| | Date | Day | Time | Project Activity |
|---|---|---|---|---|
| 1 | <Month, day, year> | <day of week> | <time> | Request for Proposal distributed |
| 2 | <Month, day, year> | <day of week> | <time> | Deadline for submission of questions |
| 3 | <Month, day, year> | <day of week> | <time> | Answers posted/released |
| 4 | <Month, day, year> | <day of week> | <time> | Vendor proposals due |
| 5 | <Month, day, year> | <day of week> | <time> | Short-listed finalists notified |
| 6 | <Month, day, year> | <day of week> | <time> | Vendor demos/interviews completed |
| 7 | <Month, day, year> | <day of week> | <time> | Apparent successful Proposer named |
| 8 | <Month, day, year> | <day of week> | <time> | Contract executed |
| 9 | <Month, day, year> | <day of week> | <time> | Project startup |
| 10 | <Month, day, year> | <day of week> | <time> | Anticipated project completion |

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## Section 2 - Instructions and Procedures

### 2.1 Communication

Any questions about the solicitation shall be in writing and submitted through email to:

<Primary Contact>
<Organization Name>
<Phone number>
<email>

Copy: <Additional Contact>
<Organization Name>
<Phone number>
<email>

Proposers who contact any individuals representing <Organization Name>, other than the above named designated individual, may be disqualified from consideration. Questions must be submitted by email no later than <time>, <date>. <Organization Name> will respond to all written questions submitted by this deadline.

<Organization Name> will not conduct a preproposal conference for this procurement. To obtain answers to any questions, or for further clarifications, submit all questions as noted above. <Or, replace with a section providing date, time, and location of a pre-proposal conference.>

### 2.2 Addenda

<Organization Name> may make changes to this solicitation. Oral or other interpretations, clarifications, or submittal instructions will be without legal effect. Any information modifying a solicitation will be furnished to all known proposers by a formal, written addendum.

### 2.3 Proposal Format

It is essential that <Organization Name> be able to easily match a Proposer's response with this RFP's requirements. Therefore, all proposals must use this RFP to format the actual response. Failure to follow this format will be grounds for rejection. Where appropriate, indicate compliance and/or note any exceptions to the requirements and provide responses to all questions.

Proposals should be clear and economical, providing a straightforward and concise description of the Proposer's capabilities to satisfy the requirements of this Request for Proposal. Emphasis should be placed on clarity of content.

### 2.4 Proposal Pricing

The Proposer shall submit the proposed pricing on the forms in Section 6.3 or provide a formatted pricing response that includes the identical information.

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## 2.5 Proposal Submission Requirements

The Proposer shall submit one (1) electronic copy of the proposal, provided in unlocked Microsoft Word format and spreadsheets provided in unlocked Microsoft Excel format.

Proposals shall be delivered on or before <time>, <date> to the following:

*<Delivery address>*

## 2.6 RFP and Proposal Participation Requirements

### 2.6.1 Right of Selection/Rejection of Proposals

<Organization Name> reserves the right to select a proposal for telecommunications services and equipment through negotiations. <Organization Name> reserves the exclusive right to select or reject any or all proposals for any reason, to waive any informality in the proposals received, and to waive minor deviations from the specifications. <Organization Name>'s waiver of any informality or immaterial deviation shall in no way modify the RFP documents or excuse the Vendor from full compliance with the RFP requirements. Selection of a Vendor as the apparently successful Vendor shall not be construed as an award of a contract but as the commencement of contract drafting, discussions, and negotiations. <Organization Name> may select an apparently successful Vendor on the basis of information in addition to that received in a proposal. It is emphasized that all proposal responses should be complete and submitted with the most favorable financial terms.

<Organization Name> specifically reserves the right to reject the proposal of any Vendor who submits a false, incomplete, or noncompliant proposal response, or unresponsive statements in its proposal.

### 2.6.2 Incorporation of RFP and Proposal in the Final Agreement

This RFP and the Vendor's proposal response, including all promises, warranties, commitments, and representations made in the successful proposal, shall be binding and be included in <Organization Name>'s contract with the Vendor.

### 2.6.3 Errors in Proposals

If discrepancies between sections or other errors are found in a proposal response, <Organization Name> may reject the proposal; however, <Organization Name> may, at its sole option, correct any arithmetical error in extended price calculations or the addition of line items. Vendors are responsible for all errors or omissions in their proposal responses, and any such errors or omissions will not serve to diminish their obligations to <Organization Name>.

### 2.6.4 Cost of Development of Proposals

All expenses incurred by Vendors related to the proposal response or the selection process will be borne by the Vendor. No claim for reimbursement of time, material, or travel expenses shall be made by the Vendor against <Organization Name> or its agents, regardless of the results of the selection process. If it is in the best interests of <Organization Name>'s business needs, <Organization Name> reserves the right to cancel the entire RFP process and assumes no responsibility for any associated Vendor costs related to responding to the RFP.

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#### 2.6.5 Proposal Disposition

All materials submitted in response to this RFP shall remain the property of <Organization Name>.

#### 2.6.6 Conflicts of Interest

The Contractor affirms that to the best of its knowledge, there exists no actual or potential conflict between the Contractor's business or financial interests and either the services to be provided under this Contract or any officer, employee, or agent of <Organization Name>. In the event of a change in either private interest or services under this Contract, any questions regarding possible conflicts of interest that may arise as a result of such change shall be brought to the immediate attention of <Organization Name>. For the duration of this Contract, the Contractor shall refrain from undertaking any work for any individual, business, or legal entity in which direct conflicts of interest regarding the services to be provided thereunder or herein may arise.

#### 2.6.7 Confidentiality

Contractor or its affiliates, or any of its officers, directors, employees, agents, or representatives, may not disclose, publish or disseminate any information considered by <Organization Name> to be confidential or proprietary that Contractor acquires through the performance of services rendered by the provisions of this Contract except by written consent. The obligations of confidentiality stated herein shall not apply or will cease to apply to any information that was known to Contractor prior to the Commencement Date of the Contract; or becomes publicly available; or is received from a third party without obligation of confidentiality to Contractor; or is developed independently by Contractor without the use of confidential or proprietary information.

#### 2.6.8 Non Solicitation of Employment

Contractor and <Organization Name> agree not to offer employment, hire, or in any way compensate any employee, former employee, or independent contractor involved in this project without prior written consent of the other party for a period of one year from the Commencement Date of the Contract.

#### 2.6.9 Non-Collusion

The Contractor certifies that his/her firm has not entered into any agreement of any nature whatsoever to fix, maintain, increase, or reduce the prices or competition regarding the items covered by this Request for Proposal.

## 2.7 Standard Terms and Conditions

The following <Organization Name> terms and conditions will be made a part of any subsequent contractual agreement with the awarded contractor.

## 2.8 Evaluation Criteria and Process

<Organization Name> will evaluate proposals based on how well the proposal meets its needs, as determined by the Proposer's response to the requirements defined in the RFP. <Organization Name> reserves its right to make a final decision to procure the solution that provides the best value. This includes a combination of functional and technical features, risk avoidance, and price.

<Can include categories and percentage of "weight" if desired or required>

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## Section 3 – Vendor Qualifications, Service, and Support

### 3.1 Contact Information

Provide contact information for the proposing Vendor and any other components (describe) proposed as part of the solution

| Proposing Vendor - core product/service | | Email Address | Phone |
|---|---|---|---|
| | Account Representative | | |
| | Contract Executive | | |
| | Sales Engineer | | |
| Additional components | | Email Address | Phone |
| | Point of Contact | | |
| | Point of Contact | | |

### 3.2 Vendor Information

a. Parent company (if applicable):

b. State of incorporation:

c. Federal identification number:

d. <Insert applicable locale> business license number:

e. Size of organization:

f. Total number of installed base customers:

g. Total number of installed base users licensed:

h. How long has your solution been based on the proposed platform?

i. Describe your certifications and credentials that indicate your expertise and commitment to a cloud solution practice. Also provide specific designations that identify specialty areas of focus and capability.

### 3.3 Proposed Product Manufacturer

List for each proposed solution component:

a. Manufacturer name

b. Headquarters address

c. Original release date of this family of systems

d. Release date of this model of system

e. Release date of the proposed level/version of software

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## 3.4 Key Personnel

The proposal must include a list of project team members, including technical staff, available for service to equipment at the customer premises, as well as at the hosted site, during and after the installation.

<Organization Name> desires to retain the same key personnel, including Vendor Project Manager and Software Engineer(s), over the length of the project. Any unavoidable changes in key personnel must be communicated to <Organization Name> in writing with as much advance notice as possible.

Using the following table, provide a list of the proposed project team members. The list shall include the role and responsibility for each team member and any pertinent certifications they have obtained.

Specific roles that should be itemized include:

| Name | Experience | Office Location | Role/Tasks; Product Focus |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Provide answers to the following questions:

1. Are you a broker for services, or is your model direct delivery?
2. If multiple Vendors are involved, will one have prime responsibility?
3. Which carriers have a physical presence in your data center?
4. Describe any additional or complementary services you can provide as an extension to your CaaS service.

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## 3.5 Customer References

The Proposer must submit a minimum of three (maximum of five) relevant customer references for which the Proposer has provided a similar solution within the last three years. The systems must be currently in full production use, and the customer contact center(s) must be of similar size and complexity to <Organization Name>. The solution must be presently in full production use (sales pending implementation of key components do not qualify). References will be contacted only for finalist Vendors and only after prior notification is sent to the Vendor.

| | | |
|---|---|---|
| Reference 1 - Client Name: | State: | Type of Business: |
| Contact Name: | Job Title: | Phone Number: |
| System Replaced: | Email Address: | |
| Number of Users | When Implemented: | |
| Description / Notes: | | |
| | | |
| Reference 2 - Client Name: | State: | Type of Business: |
| Contact Name: | Job Title: | Phone Number: |
| System Replaced: | Email Address: | |
| Number of Users: | When Implemented: | |
| Description / Notes: | | |
| | | |
| Reference 3 - Client Name: | State: | Type of Business: |
| Contact Name: | Job Title: | Phone Number: |
| System Replaced: | Email Address: | |
| Number of Users: | When Implemented: | |
| Description / Notes: | | |
| | | |
| Reference 4 - Client Name: | State: | Type of Business: |
| Contact Name: | Job Title: | Phone Number: |
| System Replaced: | Email Address: | |
| Number of Users: | When Implemented: | |
| Description / Notes: | | |
| | | |
| Reference 5 - Client Name: | State: | Type of Business: |
| Contact Name: | Job Title: | Phone Number: |
| System Replaced: | Email Address: | |
| Number of Users: | When Implemented: | |
| Description / Notes: | | |

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## 3.6 System Support / Maintenance

### 3.6.1 Maintenance

All equipment and services provided shall be included in the monthly rates quoted and shall include all maintenance, software support, and upgrade costs. Clearly identify if any items are optional, including elements that can be purchased instead of included in the monthly rate (such as phones, gateways, etc.).

### 3.6.2 Service-Level Agreement

The Vendor must provide a Service Level Agreement (include with the proposal as an attachment) that addresses each of the following:

- Latency
- Packet delivery
- Response time for repair
- Alarm response
- Definition of major and minor alarms
- Monitoring for carrier local loop
- Monitoring for any on-premises equipment
- Security protection of <Organization Name> data
- Frequency of software upgrades
- Policy for software patches

Provide answers to the following questions:

1. State the Vendor's guaranteed service response time for a:
   a. Major alarm
   b. Minor alarm
   c. Standard service request
2. Describe maintenance/troubleshooting operations.
3. If there is an alarm at the Vendor's site, how is <Organization Name> notified?
4. What is the process for software upgrades, and how are customers notified? How is interruption of service avoided? Do you offer the flexibility for individual customers to stay on an older release if needed or desired?
5. What security measures will be taken to protect <Organization Name> data?
6. Describe the tools you use for deployment management.
7. How long does it take to deploy (both the initial services and subsequent additions or changes)?
8. How do you handle service requests? What types of online tools exist for reporting and tracking troubles, change requests, etc.?
9. How are moves, adds, changes, and deletes (MACDs) for end users handled? Do you provide an administrative interface for customer administrators to self-manage these? If so, describe the portal or other access tool that is available to customer/location administrators and/or end users to modify their services. Are there any charges associated with user-managed MACDs? What are the costs, if any, for MACDs that are completed by remote Vendor personnel?
10. For the network services, how is support and troubleshooting handled? Will you coordinate all service work? Do you have the means and knowledge to provide end-to-end testing?

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11. What are the options and ability to add additional features and capabilities? What is the policy toward implementing the manufacturer's upgrades? How do you decide when and if to upgrade or enhance the solution when the possibility exists? Do you allow or support any third-party enhancements to the solution?
12. What types of performance monitoring tools are included? Do you have direct access to those tools and reports? Can you get proactive notification of service events, alarms, and other exception events?
13. Are any other management tools provided, such as online access to billing, usage reports, etc.? Describe the portals available to obtain such information.

## Section 4 – Technical and Functional Specifications

### 4.1 Current Environment

<Describe the general communications environment of the organization, including current products and services used today, with an emphasis on the elements to be replaced. If relevant, describe any changes, such as expansion or consolidation, that reflect the near-term plans for communications.>

#### 4.1.1 Telephony Environment

<Describe your current data, telephony and voice messaging systems and plans.>

#### 4.1.2 Computing Environment

##### 4.1.2.1 Core services

- <Describe>

##### 4.1.2.2 Desktop systems

- <Describe>

##### 4.1.2.3 Database platform(s)

- <Describe>

##### 4.1.2.4 WAN/connectivity

- <Describe>

### 4.2 General System Design

<Organization Name> has a strategic goal to <describe overall communications plan>.

#### 4.2.1 Architecture/Business Continuity

##### 4.2.1.1 Core hardware such as processors, power supplies, hard drive systems, network interface cards, etc. must be redundant and fault tolerant to avoid single points of failure.

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4.2.1.2 The ideal solution provider will peer directly with broadband data carriers in the <Organization Name> network.

4.2.1.3 The system(s) shall have a version of the manufacturer's operating software that has been released within the past fifteen (15) months.

4.2.1.4 The proposed solution must be capable of surviving the loss of any single critical component. Thus, the system must be designed to avoid a "single point of failure" with redundant core components in an "active/active" configuration that includes duplicated power supplies and other required elements to eliminate system outage. If available, the proposed solution shall show as an option the costs to link <Organization Name> to a minimum of two separate Vendor data centers with redundant network connections.

4.2.1.5 The carrier network connections from the hosted provider to the contact center and <Organization Name>'s corporate headquarters must be over a deterministic network that can ensure call quality. <Organization Name> must have the ability to choose between G.729 and G.711 codecs or better (if wideband codecs are available).

4.2.1.6 The proposed solution must provide the ability to use an alternate route that will leverage the <Organization Name> LAN data network to distribute calls to the users.

4.2.1.7 The proposed solution must perform data backup and storage such that no data is lost in case of system failure.

Provide answers to the following questions:

1. What is the manufacturer of the core solution? Identify any other manufacturers' products used to create the total solution.
2. What is the relationship between manufacturer and Vendor? What support services does the manufacturer provide to the Vendor?
3. Is the core service a dedicated instance of the system, or is the service provided strictly as a service where all users are tenants of a single shared platform?
4. Describe any events that would result in a "failure" of the system and require a restart, reregistration, database load, etc., to return to a fully operational state. How long does the recovery take?
5. Do you provide a geographically separate backup data center site? Are the system elements accurate copies of the current system, hot-standby (define), or will a failover maintain the entire operation without users and callers being able to tell? What happens to calls in progress, calls in queue, etc.?
6. What are the survivable options if the link(s) to the data center fails? Can the end users still dial an emergency call (such as 911 in the U.S.)? Does the proposed solution offer local telephony survivability in case the link to the service provider fails?
7. What are the documented service uptime statistics? Provide details on the root cause of any service interruptions over the past two years.

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4.2.2 System Maintenance, Upgrades, and Diagnostics

4.2.2.1 The service must be provided so that routine maintenance procedures, troubleshooting, loading hardware and software revisions, patches, etc., may be performed without disrupting the client's service.

4.2.2.2 When the system detects a fault, notification must be provided to <Organization Name>.

4.2.3 Systems Management/Administration

4.2.3.1 An access method is required so that trained <Organization Name> personnel can perform standard system software-based changes.

4.2.3.2 <Organization Name> system administrator(s) must be able to "build" and modify station programming, routing rules, user groups, and other system features, and to print reports concerning such database information.

4.2.3.3 The system(s) must be capable of providing multiple administrative levels, based on user profiles.

4.2.3.4 The system(s) shall be easily accessible and easy to query, modify, and manage using a GUI.

4.2.3.5 Preprogramming of tasks that can be scheduled to execute later (typically during off-hours) must be supported.

4.2.4 Dial Tone and Network Services

4.2.4.1 The hosted provider must extend inbound Automatic Number Identification (ANI) or Caller ID digits to the users.

4.2.4.2 ANI data must also be available to peripheral devices, including voicemail systems and analog extensions.

Provide answers to the following questions:

1. What type of network interconnection from the data center to the <Organization Name> sites is included in the proposal? Describe, including if it is point-to-point, via Multiprotocol Label Switching (MPLS), or via a VPN on a standard Internet link.
2. Are you a carrier that can deliver both the CaaS services and telephony and network services?
3. If the answer to number 2 above is "no," which carriers are available for the network link, and do these carriers require a separate contract or is it a bundled service?
4. For mobile staff and small sites, are Internet-based VPN options available to deliver telephony and collaboration services?
5. Which carriers are available for Internet-based connections, and do they have direct peering arrangements with your preferred Internet carrier?
6. Do the carriers available at the data center have physically separate redundant paths for the local loop?

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7. Can the data center route traffic over more than one carrier in the event of a failure in the primary carrier's service?
8. How is call quality ensured (including Quality of Service [QoS] options and VLANs)? Define how you establish and support QoS to ensure that real-time communications are prioritized.
9. Are the inbound and outbound telephone call traffic merged with the phone traffic from other customers at the data center and using shared telco facilities? If so, how do you engineer the network to ensure that a surge in volume from other firms does not prevent <Organization Name> calls from being completed?
10. If the answer to number 2 above is "no," which carriers are available for the dial-tone component of the service, including toll-free services?
11. What is the geographic coverage available for free calls (local to <Organization Name>) and toll calls?
12. For calls charged as long distance and inbound toll-free calls, what are the rates per minute, the billing increment, and the minimum charges? Are these costs part of your billing, or is a separate agreement and invoice from the long-distance carrier needed?

4.2.5 Security

Provide answers to the following questions:

4.2.5.1 How is physical access to the data center(s) controlled?

4.2.5.2 Describe the written policies, procedures, and methods for ensuring security.

4.2.5.3 Explain how you maintain compliance with applicable rules & regulations (such as PCI, HIPPA, etc.).

4.2.5.4 Do you provide a written Service Level Agreement that covers security concerns, risks, and liability coverage?

4.2.5.5 Do you provide encryption of all stored data?

4.2.5.6 Can all media packets (voice, video, IM, etc.) in transport be encrypted?

4.2.5.7 Who has access to the de-encryption keys?

4.2.5.8 What types of operating systems are running on the servers and how do you secure them from exploits?

4.2.5.9 What is in place to prevent device-level exploits? This should include any locally installed gateways, data-storage devices, and the telephones.

4.2.5.10 What type of security exists within the applications to prevent abuse and malicious activities?

4.2.5.11 What security measures are in place to grant access to authorized <Organization Name> staff that need to access the system's management tools?

4.2.5.12 How do you protect the services from standard IP vulnerabilities, including denial-of-service attacks?

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### 4.2.6 Telephony Features

The core telephony solution must provide, at a minimum, the full range of features resident in current state of the art PBX systems. This would include common telephony capabilities such as, but not limited to, the basic features of hold, transfer, redial, park, pickup, call forwarding outside system with return (sometimes called single number reach with one mailbox), distinctive ringing, etc.

The following features are called out separately as they may be differentiators and are intended to guide the Vendor's proposed solution:

4.2.6.1 The new system must support a call history log with the ability to launch a callback from the history log, as well as export the log, including Caller ID.

4.2.6.2 It is desired to have the call history log on the phone as well as the PC client.

4.2.6.3 The new telephony system must be able to interface to zone paging systems

4.2.6.4 The solution must provide advanced emergency call capabilities such that the location of all devices, including IP phones, are associated with either a switch port, an IP address, or some other controlled location identifier. This location information and the related user information should be maintained in a database that accommodates automatic updates to the PSAP database when a device/user is moved.

### 4.2.7 IP Desktop Requirements

The new system architecture must support a blended desktop environment as follows <update as appropriate for the organization>:

4.2.7.1 Some locations will have IP transport to the desktop dedicated to the voice network, separate from the internal IP data network. The sets at these sites must interface with the supplied switch electronics, and do not need to support secondary data ports.

4.2.7.2 Other locations will have IP transport to the desktop that supports both voice services and desktop computing (PC) services via a single 100 Mbps channel. The desktop interface device must support Layer 2 switching for the PC's NIC card as well as the telephone instrument.

4.2.7.3 IP sets must be compatible with the 802.3af (Power over Ethernet) Industry Standard.

4.2.7.4 The proposal shall include electronic IP sets with the capacity for a minimum of two extension lines plus programmable buttons and a hands-free full-duplex speaker phone.

4.2.7.5 The sets are to be designed so that the users have the option to answer a second call to their personal extension number before the call routes to alternate answering points, such as voice mail.

4.2.7.6 Some of the programmable buttons are for features that do not have a fixed button; "Context-sensitive" soft-keys may be substituted for this requirement.

4.2.7.7 It is desired that the phones use an LCD designation (paper-less) of all telephone set buttons.

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4.2.7.8 An “Operator” software tool should be provided for the receptionist with the ability to see user extension status or presence, and allow for full PC-based control of the functions such as answer, transfer, hold, etc.

4.2.7.9 The service should support a variety of IP sets; describe the IP sets available with the solution and provide pictures and fact sheets.

## 4.3 Telephony Functional Requirements

This section identifies requirements outside of the common telephony feature set for which you must propose a solution.

### 4.3.1 Instant Messaging and Presence

4.3.1.1 If part of the manufacturer’s product line, the Vendor should propose an Instant Messaging solution that is capable of logging, recording, and archiving messages.

4.3.1.2 For those users where a camera is part of their desktop setup, <Organization Name> wishes to include desktop video as part of the proposed solution.

### 4.3.2 Desktop Interfaces

4.3.2.1 <Organization Name> requires the ability to use a PC-based call control (desktop application) that works in conjunctions with the fixed telephones. Also provide specific designations that identify specialty areas of focus and capability.

4.3.2.2 The call control client should include, at a minimum, mouse controls of features, keyboard access to telephony directories, “click to dial” features including recognizing a telephone number within a document or web page displayed on the PC screen, call logs, one-click to activate record on demand (for those that are authorized), etc.

4.3.2.3 <Organization Name> requires the capability for a significant number of users to use the PC client as a fully functional soft-phone without any associated telephone set.

4.3.2.4 Users should have the ability to make basic programming changes to their telephone sets (browser-based).

4.3.2.5 The system should support integration with the contact lists from Microsoft Outlook and other tools such as Google mail.

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4.3.3 Mobility

Many users carry a cell phone and radios are used in specific areas of <Organization Name>, such as <insert applicable departments>. <Organization Name> <has / is considering> a managed BYOD policy that will include iPhones, Android, Windows, and tablet devices.

4.3.3.1 The system must extend office telephone system features to mobile employees, both onsite and offsite.

4.3.3.2 At a minimum, the proposal should include the integration of desk phones with cell phones (single number) and the ability to bridge calls (simultaneous ring) while maintaining only one (system) mailbox.

4.3.3.3 The system should also allow for a mobile client for the various client devices, including cell phones, tablets, etc. Please define what mobile operating systems you support with a mobile client and identify what costs exist (if any) to obtain or use such apps.

4.3.4 Teleworkers

4.3.4.1 The system must support telecommuting as an option for some employees.

4.3.4.2 The system should allow the telecommuting employee to have full functionality at their remote location using the device of their choice. Flexible deployment options to accomplish this must be described. Describe how call quality is assured for remote workers.

4.3.5 Conferencing and Collaboration

<Organization Name> wishes to incorporate a full conferencing suite into the complete solution.

4.3.5.1 The proposed system must provide ad-hoc conferencing for up to six parties per call, and up to <xx> simultaneous conference calls. This capacity is in addition to the conference bridge requirement described in 4.3.5.3.

4.3.5.2 Meet Me conferencing for up to six parties is also desired. If this is not part of the core system capability, the system should be configured to support up to <xx> simultaneous six-party Meet-Me conferences. If the ad-hoc conferencing and this limited meet-me conference uses the same internal resources, the capacity required is a total of <xx> simultaneous six party conferences for the combined two methods of conferencing. This capacity is in addition to the conference bridge requirements described below.

4.3.5.3 In addition to 4.3.5.1, and 4.3.5.2, the proposed solution should include integrated access to a conference bridge service for larger meet-me conferences – capable of supporting up to <xx> users on a single conference call and up to <xx> total simultaneous conference participants for all active conferences. The system shall also provide the ability to host collaboration features similar to Cisco WebEx, including the option for video, on the proposed bridge for the same number of participants.

4.3.5.4 The conferencing solution should support dynamic allocation of the conferencing ports.

4.3.5.5 The conferencing solution must provide easy scheduling of conferences via the desktop Outlook or Google <use what is appropriate for organization> client, with the ability for self-service by individual departments / users.

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4.3.6 Voice Mail / Unified Messaging

4.3.6.1 The system must be able to allow users to easily transfer active calls directly to another user's voicemail box, bypassing the user's telephone, when appropriate.

4.3.6.2 The system must allow for users to have their choice of basic voicemail, integrated messaging, or unified messaging. Describe how you accomplish each of these.

4.3.7 Video and Videoconferencing Capabilities

4.3.7.1 The system must allow for point-point video calls between users.

4.3.7.2 The system must allow for multi-point video calls between users. Ideally there are options for ad-hoc, rendezvous or meet-me video conferences, and scheduled conferences.

4.3.7.3 The video system must be able to interoperate with other standards-based video systems to extend its reach to existing internal systems or to an external business partner system.

4.3.7.4 Interoperability: The proposed solution should be interoperable with hard and soft video enabled endpoints that are standards-compliant, including multi-screen and single-screen, room-based and personal endpoints; ranging from video-enabled phones, soft phones, mobile endpoints, to high-end immersive systems. The solution should be able to support BYOD (and not limit user options).

4.3.7.5 Although all capabilities may not be implemented immediately, the solution should include the following:

a) Escalating a voice call to a video call at any time during the call, provided endpoints are video-capable.

b) Ability to start and join a multi-party video conference without advance reservation.

c) Meeting controls to manage a meeting in progress including muting/unmuting participants, locking/unlocking an active meeting to additional participants, reassigning hosts, etc.

d) Support for "virtual meeting rooms" or video bridges with pre-defined maximum number of participants that can be used by multiple users across the company by 'booking' the virtual meeting room in advance.

e) Ability to assign and delete host pins.

4.3.7.6 When bridging resources are shared with other customers, the solution must provide an architecture that ensures security of the video calls so no 'eavesdropping' can occur, accidental or otherwise, by other customers.

4.3.7.7 The proposed solution must provide support for guest access outside the corporate network, for mobile or guest workers.

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Provide answers to the following questions:

1. Describe the proposed system. What parts of the system are shared between different customers, and what parts are dedicated?
2. How is separation between customers and security of video calls and conferences maintained?
3. What resolutions of video are supported for point-to-point and multipoint video calls?
4. Specify the kinds of endpoints supported for point-to-point and multipoint video calls.
5. What is the approach to maintaining quality of experience (QoE)? In cases where one participant in a multipoint video conference is bandwidth constrained, what measures are taken to ensure minimal impact on QoE for other participants?

## 4.4 Contact Center System Capabilities

### 4.4.1 Business and Technical Requirements

It is recognized that the Vendors may have multiple solutions they can propose that are capable of providing basic and advanced features. This section identifies requirements outside of the common contact center feature set for which you must propose a solution.

4.4.1.1 The proposed solution must provide advanced contact center capabilities. Although all capabilities may not be implemented immediately, the solution must include the following:

- Multimedia routing (voice, email, fax, chat)
- Agent and supervisor desktop client
- Real-time and historical reporting
- IVR
- Quality Monitoring and Recording
- Workforce Management

4.4.1.2 The contact center must be able to easily transfer calls to and from the standard telephony system users. Where these users are on a different system, it is desired that the link between the two systems supports typical caller information exchange such as name and number of the caller.

4.4.1.3 The system must support third-party software integration to enable applications such as Screen Pop from <Organization Name> databases including but not limited to <identify specific database programs used>.

4.4.1.4 Agents must be able to log in from a remote location, with the same suite of tools that is available to on-site agents.

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4.4.2 Routing of Calls

4.4.2.1 The system must have flexible rules-based routing, easily customized by <Organization Name>.

4.4.2.2 The system must be capable of skills-based routing.

4.4.2.3 Agents need to be able to service multiple queues, with a clear indication of queue status.

4.4.2.4 Solution must provide queuing with the ability for customized on-hold messages.

4.4.2.5 Calls delivered to a logged out agent must be re-routed with priority to front of queue.

4.4.2.6 Authorized users must have the ability to make changes “on the fly” to call routing schemes, including announcements, without requiring IT or Vendor involvement and without impacting current calls or core system functionality.

4.4.2.7 Calls transferred from a remote office or other <Organization Name> site should be identified as such, including the name of the remote site. This information should also be captured for reports.

4.4.3 Agent Tools

4.4.3.1 The Agent PC client must be customizable for the group where it is deployed.

4.4.3.2 The display must provide real-time individual and group statistics, queue status and threshold alerts.

4.4.3.3 Agents should be provided a drop-down window with descriptions rather than numeric codes for transaction or wrap-up codes.

4.4.4 Supervisor Tools

4.4.4.1 The Supervisor PC client must provide real-time individual and group statistics, queue status and threshold alerts.

4.4.4.2 Supervisor views should incorporate data from multiple sources including the various modules and tools used to process and manage calls.

4.4.4.3 Supervisors must be able to react to events and re-allocate resources, including announcements, via the on-screen tool.

4.4.4.4 Announcements must be easy to change, allow for pre-recording of scripts and be administrable by authorized supervisors.

4.4.4.5 Supervisors must have the ability to create, edit, or delete agent accounts.

4.4.4.6 The proposed system must have the ability to automatically log agents out under user defined conditions.

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4.4.5 Reports

4.4.5.1 Reports must provide a real-time and historical view.

- Reports should include access to all raw data for 120 days.
- Standard and historical reports should be available for 15 months.

4.4.5.2 Reports must include at a minimum the following statistics:

- Number of calls in queue
- Length in queue
- Average speed of answer
- Abandoned and “zero out” calls and time of abandonment
- Peak traffic (by time of day, day of month, etc.)
- Statistical report summaries in 5-minute increments
- Calls forwarded to voice mail
- Calls transferred in versus direct dialed (and where from)
- Calls transferred out (and where to)
- Calls by transaction, busy, and idle codes
- Incoming route identification
- Calls offered/handled/abandoned
- Average hold time
- Average delay
- Work/not ready time
- Talk time
- Average calls per hour
- Calls and time on outbound calls

4.4.5.3 Reports must be easy to customize by <Organization Name>.

4.4.5.4 The system must provide the capability to print reports to any local or network-connected available printer and export or save the reports in a variety of file formats.

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4.4.6 IVR Capabilities

<Organization Name> wishes to implement an Integrated Voice Response (IVR) system to provide call handling functions that span multiple departments as well as serving as a “front door” to the contact center. Departments outside of the contact center may also utilize the IVR for self service options.

4.4.6.1 The system must be capable of voice recognition for basic commands such as Yes, No and other simple words or pre-determined phrases and also accept touchtone responses in the prompt (i.e. “Please say or press 1”).

4.4.6.2 The system should be capable of adding natural language speech recognition.

4.4.6.3 The system should be capable of multiple languages and provide <Organization Name> with the ability to add languages as required.

4.4.6.4 The system should be fully integrated with the core telephony system, call center software, and <insert any applicable underlying systems that require integration> and be able to incorporate report details from each to produce cradle to grave reports.

4.4.6.5 The system must be easy to administer by <Organization Name> and provide GUI front-end tools for scripts and configuration changes.

4.4.6.6 The system must be capable of collecting ANI information used for routing rules.

4.4.6.7 The system must be capable of providing callers with an accurate Estimated Wait Time.

Provide answers to the following questions:

1. Provide an overview of the proposed IVR, and discuss how it meets the requirements.
2. Where there are additional charges for capabilities not included in the core offer, they must be indicated as line item pricing, including professional services or custom development charges.
3. How is the system integrated with the call center software, including the ability to provide cradle to grave reports?
4. Describe how the system is administered including scripts and configuration changes.
5. What is the method for testing of scripts?
6. What language options (and how many) are included in the basic package?
   a. What are the options for adding additional languages?
   b. List all available languages
7. Describe the basic speech recognition capabilities included in the proposed IVR.
   a. What are the options for adding natural language speech recognition?
8. Describe the queued callback (virtual hold) and scheduled callback capabilities of the proposed IVR.
9. Is there a Customer Survey function?

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4.4.7 Call Recording / Quality Monitoring

The proposed system should be capable of <scheduled call recording for quality monitoring purposes or recording all calls>.

4.4.7.1 The proposed system should capture and store recordings at the hosted equipment site.

4.4.7.2 The contact center and quality monitoring capability of the system must include a synchronized screen capture of the agent's PC activity, including the ability to screen scrape over multiple monitors. Playback of voice and screen scrape must be fully synchronized and automatically linked in playback through a single supervisor/review tool.

4.4.7.3 The system must provide the ability to retrieve calls by user defined parameters such as by agent, for defined intervals, or by specific queues, etc.

4.4.7.4 The system should be capable of providing evaluation and coaching tools.

Provide answers to the following questions:

1. Describe the proposed system. Is it part of the core contact center platform or a separate system?
2. How is sensitive data protected?
3. Where are recordings stored?
4. Describe the scheduling tool.
5. Describe the steps required for synchronized playback of voice recording and screen capture.

4.4.8 Workforce Management Capabilities

4.4.8.1 Interface with the proposed contact center solution to extract data required to build forecasts

4.4.8.2 Provide forecasts that include annually, quarterly, monthly, daily, and specified intervals.

4.4.8.3 Include customer defined causal factors such as historical data, seasonal trends, etc.

4.4.8.4 Ability to create shift-based schedules.

4.4.8.5 Ability to create demand-based schedules (time assigned to fit workload).

4.4.8.6 Real Time Adherence viewing tool.

4.4.8.7 Adjust schedules based on real-time changes.

4.4.8.8 Track and compare adherence to schedules (actual vs. scheduled).

4.4.8.9 Provide alarms when agents do not adhere to schedules.

4.4.8.10 Provide agent scorecards to measure performance against metrics.

Provide answers to the following questions:

1. Provide an overview of the proposed WFM solution, and discuss how it meets the requirements.

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## Section 5 - Statement Of Work (SOW)

### 5.1 Approach

The following sample SOW is supplied as a template for responding Vendors to create a proposed SOW for this project. It is intended to demonstrate the minimum requirements and the desired level of project detail to be included in the submission.

Use this template to write a SOW appropriate for this project and provide applicable pricing. The Vendor should customize this template as necessary to ensure it is a suitable SOW for the delivery of their services. The Vendor's SOW response, including any modifications agreed to by the parties, will become the core element of any subsequent contract.

### 5.2 Implementation Template

The Vendor is responsible for comprehensive project management services that include the ability to define and offer what are considered industry best practices for the implementation of a hosted solution of this scope, and that address the expectations of both the Vendor and <Organization Name>. The Vendor SOW shall include project controls and processes that will ensure a smooth implementation. Proposals should clearly outline the Vendor's methodology and address the following items.

- Project Planning Process/Methodology/Project Plan
- Project Risk Management/Mitigation
- Required Protocols/Standards
- Testing and Acceptance Procedures
- Training
- Documentation
- Implementation Support

Except as otherwise specifically provided in this SOW, Vendor will design, develop, and deliver a fully operable, comprehensive, integrated telephony and contact center solution which meets all of the requirements set forth in the RFP and this SOW, for the monthly service pricing set forth in the Contract Documents, and will demonstrate such solution for acceptance by <Organization Name> as more fully set forth in this SOW. Costs associated must include all supervision, labor, materials, equipment, and testing instrumentation required for the work associated with the project, as well as any overtime that may occur.

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5.2.1 Vendor will provide the following resources:

- Vendor will provide a Project Manager experienced with the proposed solution to serve as <Organization Name>'s single point of contact in all aspects of this engagement including but not limited to scheduling, defining requirements, change control, risk mitigation, escalation, implementation planning, and acceptance.
- Vendor will provide a Project Manager who shall work in accordance with, and under the direction of, <Organization Name> Project Manager to verify design specifications and end user requirements.
- Vendor will provide guidance on best practices; however it is understood that the unique design requirements of <Organization Name> will be the determining factor.
- Vendor will provide one or more Certified Trainers in order to complete the training requirements described in Section 5.9 below.
- Vendor will provide a Project Engineer to be the primary technical resource for delivery of the services proposed herein.
- Where multiple platforms or applications are used, the project engineer must be fully versed in those components or additional qualified engineers must be available to the project team as required to support the complete solution.
- Vendor will provide a resource for integration purposes and any custom configuration that may be required to meet specific needs of <Organization Name>, including integration with the existing telephony system(s) during all phases of the implementation.

## 5.3 <Organization Name> Resources

5.3.1 <Organization Name> will provide the following resources:

- <Organization Name> will provide an internal Project Manager or designate a Project Manager to represent <Organization Name>, to work closely with the Vendor project team. <Organization Name>'s Project Manager's responsibilities will be to facilitate all communication and meetings between Vendor Project Manager and <Organization Name> project team, and to ensure that <Organization Name> is meeting the deadlines for accomplishing any <Organization Name> tasks set forth in the project schedule. The Vendor must understand that <Organization Name> and its designated Project Manager will provide overall project direction.
- <Organization Name> will provide one or more resources to assist the Vendor Project Engineer with design specifications, data gathering, and compilation of end-user database.
- <Organization Name> will provide one or more technical resources to assist the Vendor Project Engineer with the required network configuration, and other technical requirements.

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## 5.4 Project Plan/Schedule

5.4.1 Vendor Project Manager shall provide a detailed Project Plan/Schedule, subject to approval by <Organization Name>, which documents all activities and timelines associated with the project including, but not limited to:

- Services ordered, including any required onsite equipment
- Equipment received
- Network readiness assessment (if required)
- Network and services coordination
- Solution design and configuration
- On-site training – timelines for system administration and end user training
- On-site installation of any required equipment
- Testing and acceptance
- On-site and remote post implementation support

## 5.5 Project Management

5.5.1 The Vendor must address the following (Project Management Approach)

- Risk management
- Issues management
- Financial management
- Change Control

5.5.2 Vendor Project Manager shall:

- Participate in planning meetings, weekly status meetings, weekly conference calls and e-mail communications with <Organization Name> to discuss the project and coordinate activities.
- Maintain the Project Plan/Schedule, track dependencies between Vendor and <Organization Name> tasks, identify and manage Vendor initiated project risks, and alert both project teams of any timeline slips and their effect on the project's target end date.
- Work in partnership with <Organization Name>'s Project Manager to coordinate Vendor tasks with <Organization Name> tasks throughout all phases of the project.
- Provide on-site project management, technical and user support during cut-over, to include up to 3 days of post-live assistance. The Vendor Project Manager will use an organized incident management process to track, document and resolve all identified issues.

5.5.3 <Organization Name> Project Manager shall:

- Participate in planning meetings, weekly status meetings, weekly conference calls and e-mail communications with the Vendor to discuss the project and coordinate activities.
- Identify <Organization Name> initiated project risks and manage resolution.
- Monitor project budgets, approve billings.
- Manage project communications with governance bodies.
- Work in partnership with Vendor Project Manager to coordinate <Organization Name> resources and tasks throughout for all aspects of the project.

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## 5.6 Vendor Responsibilities - Pre-Installation

### 5.6.1 Carrier Services

- Vendor will work with <Organization Name> Project Manager to ensure all provider services are in place and tested prior to implementation.

### 5.6.2 End User Requirements

- Vendor and <Organization Name> Project Manager will conduct meetings with departmental representatives as needed.
- Vendor will work with <Organization Name> resource to collect, compile, and validate information for contact center agents and supervisor.
- Vendor will design any PC Client templates based on specific needs of agents and supervisors.

### 5.6.3 Contact Center Requirements

- Vendor will meet with designated contact center representative to determine call flow design, agent and supervisor requirements.
- Vendor will compile and document contact center design including:
  - Routing rules
  - Agent capabilities
  - Supervisor capabilities
  - Agent and supervisor PC client
  - Access to real-time and historical reports
  - Design of standard and any required custom reports
- Vendor will validate and document contact center design.
- Vendor will compile, validate and configure agent and supervisor queue and skill assignments.
- Vendor will configure queues and skills-based routing.
- Vendor will upload contact center programming into system.
- Vendor will work with <Organization Name> technical staff to configure and deploy agent and supervisor desktops (PC clients).

## 5.7 IVR

- Vendor will meet with designated staff to determine call flow and IVR call handling.
- Vendor will validate design, document and build call flow.
- Vendor will work with <Organization Name> to record all required announcements based on the routing scheme.

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## 5.8 Training

5.8.1 Vendor shall provide the following training

- The Vendor shall perform knowledge transfer on all elements of the proposed solution for <Organization Name>'s implementation team.
- Vendor shall provide manufacturer certified end user, supervisor, and administrative training at each <Organization Name> site, or at agreed-upon centralized locations for remote sites.
- Vendor will work with <Organization Name> Project Manager to determine training curriculum and schedules.
- Trainers must be certified on the proposed solution with at least one year of field training experience.
- Classes will be conducted on live system equipment at each <Organization Name> site or designated remote sites.
- Vendor shall provide users with Quick Reference Guides and access to online resources.
- Specialized training will be provided for contact center agents and supervisors that includes
  - Use of agent functionality as appropriate to agent skill level
  - Remote agent functionality
  - Operation of PC client including After Call Work Codes and Transaction Codes
  - Operation of supervisor or agent "chat" features
  - Access to individual metrics as appropriate
  - Operation of supervisor PC client
  - Access to conditional routing tools including announcements
  - Access to standard reports
  - Creation of custom reports
- Specialized training will be provided for system administration and management. This training may be on-site or at a Vendor/manufacturer training facility as agreed upon.
- Vendor shall make available any other training tools deemed advantageous to the ongoing training and management of the proposed systems, including but not limited to access to online resources and continuing education.

## 5.9 Installation Coordination

5.9.1 Vendor shall be responsible for the following

- Vendor shall work with <Organization Name> Project Manager to determine site installation of any required equipment, deployment schedule, cutover plan, and coordination of any required equipment delivery. Cutover work will need to be carefully scheduled and performed with minimal disruption to <Organization Name> operations.
- The Vendor shall assume all responsibility for delivery, installation, and testing of all Vendor-supplied onsite equipment.
- Vendor shall test and verify ACD queues and skills-based routing.
- Vendor shall test and verify call handling patterns including announcements and prompts.
- Vendor shall test and verify Disaster Recovery (DR) failover and recovery.

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- Vendor shall test and verify trunking, standard and alternate call routing and inbound and outbound dial plan.
- Vendor shall provide cutover coordination and support that includes the following:
  - Vendor Project Manager shall work with <Organization Name> Project Manager to determine timeline and schedule for migration to new system
  - Vendor shall provide onsite and remote (as needed) resources to support migration schedule
  - Vendor shall provide resources for (3) days of onsite business support following cutover

## 5.10 Post Installation Test and Acceptance

5.10.1 Vendor requirements include the following

- Vendor shall supply adequate resources for all post-cutover issues including training, knowledge transfer, troubleshooting, and user programming adjustments.
- Vendor shall supply a Test and Acceptance document for review and approval for <Organization Name>.
- Vendor shall work with <Organization Name> resources to conduct and document test acceptance and site sign off.

## 5.11 Documentation

5.11.1 Documentation requirements include:

- Vendor shall provide <Organization Name> with documentation compiled during the course of the project.
- Vendor shall provide final as-built documentation including, but not limited to:
  - Detailed system configuration settings
  - End user, agent and supervisor profiles
  - Contact center configurations
  - Call flow documentation
- Vendor shall provide a description of ongoing support resources available to <Organization Name> post installation. For example: knowledge base, website, trouble tickets, user guides, web based training, etc.

## 5.12 Assumptions

5.12.1 The Vendor should base their Statement of Work on the following assumptions. Any and all other assumptions must be added to this list.

- <Organization Name> cabling infrastructure, premise wiring and data connectivity to required equipment is installed, tested and capable of supporting IP traffic prior to implementation.
- <Organization Name> resources assigned to the project are available to complete project tasks on a timely basis.

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## Section 6 – System Configuration Sizing and Pricing

### 6.1 Configuration Sizing

Use the following charts to provide pricing for the initial quote. Section 6.2 will provide an indication of future growth and ultimate sizing. <Repeat as needed - one for each site.>

| Site One - <Name> | Quantity | Notes |
|---|---|---|
| Local ISDN-PRI Spans | | |
| Local SIP sessions (simultaneous capacity) | | |
| Local Analog Lines (carrier circuit) | | |
| Analog Extensions | | |
| Basic IP Phone – single endpoint per user | | |
| Advanced IP User (UC features) – one endpoint | | |
| Advanced IP User – multiple devices / endpoints | | |
| Softphone (no set) users not in above | | |
| Operator / Receptionist Positions | | |
| Contact Center Agent (Sets and Licenses) | | |
| Contact Center Supervisors (Licenses) | | |

| Site Two - <Name> | Quantity | Notes |
|---|---|---|
| Local ISDN-PRI Spans | | |
| Local SIP sessions (simultaneous capacity) | | |
| Local Analog Lines (carrier circuit) | | |
| Analog Extensions | | |
| Basic IP Phone – single endpoint per user | | |
| Advanced IP User (UC features) – one endpoint | | |
| Advanced IP User – multiple devices / endpoints | | |
| Softphone (no set) users not in above | | |
| Operator / Receptionist Positions | | |
| Contact Center Agent (Sets and Licenses) | | |
| Contact Center Supervisors (Licenses) | | |

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# Hosted/Cloud Unified Communications and Collaboration Solution

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## 6.2 Desired / Planned Deployment

The following is the planned deployment phasing, including growth:

| | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|---|---|---|---|---|---|
| Total number of users on old system(s): | | | | | |
| Number of locations on old system(s): | | | | | |
| Number of users to be moved to hosted solution during the year shown: | | | | | |
| Number of locations to be moved to hosted solution during the year shown: | | | | | |
| Number of new users (not migrating): | | | | | |
| Number of new locations (not migrating): | | | | | |
| Number of legacy systems that new hosted solution must interoperate with: | | | | | |

## 6.3 Pricing

Pricing Table 1: List all one-time charges. Mark “N/A” or “Waived” where appropriate.

| One-time Charges | Qty. | Item | Total |
|---|---|---|---|
| Core Service Offering | | | |
| Data Center Provisioning | | | |
| Carrier Circuit Installation | | | |
| On-site Equipment | | | |
| Sets (if purchased) | | | |
| Miscellaneous Hardware | | | |
| Software (such as SDK) | | | |
| Professional Services | | | |
| Integration Components | | | |
| Third-party Installation Fees | | | |
| Professional Services for Third-party Vendors | | | |
| Other (define): | | | |
| Sub-Total | | | |
| Sales Tax (where applicable) | | | |
| **TOTAL** | | | |

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Pricing Table 2: List all recurring monthly charges. Mark “N/A” where appropriate.

| Recurring Charges: Monthly service fees | Qty. | Item | Total |
|---|---|---|---|
| Core Service Offering | | | |
| Annual maintenance on Purchased Equipment | | | |
| Per user fees - basic user | | | |
| Per user fees - advanced user | | | |
| Per call center agent fee | | | |
| Per call center supervisor fee | | | |
| Per videoconferencing Virtual Meeting Room fee | | | |
| Mobility or remote user fees | | | |
| Carrier circuits (MPLS, T1, etc.) | | | |
| Trunk ports or SIP sessions | | | |
| Toll-free numbers | | | |
| DID numbers | | | |
| Gateways and other hardware | | | |
| Sets (if leased) | | | |
| Software applications | | | |
| Storage Fees | | | |
| Third-party integration fees | | | |
| Other (Define): | | | |
| Sub-Total, fixed recurring charges | | | |
| Excise tax, FCC fees, etc. | | | |
| Sales Tax (where applicable) | | | |
| **TOTAL** | | | |

Pricing Table 3: List all usage based charges, along with rates and units.

| Usage Based Charges | Unit | Rate |
|---|---|---|
| Moves, Adds, Changes, Deletes | | |
| Long Distance Costs | | |
| Other (specify): | | |

## 6.4 Additional Pricing Options

Provide below any pricing options, special offers, financing, promotions, or discounts for trading-in any legacy equipment not otherwise described within the RFP response.

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