REQUEST FOR PROPOSALS (RFP)

**CUSTOMER SERVICE CALL MANAGEMENT PHONE SYSTEM
SCOPE OF WORK
(DRAFT)**

Call Management Phone System

A. Azusa Light & Water (ALW) requests proposals for inbound and outbound hosted call center solution using Internet Protocol (IP) and softphones to serve our Customer Service Division.

Proposed solution must be capable of handling current call volume, which ranges from about 4,100 to 6,000 calls per month, distributed amongst 17 on-site agents or Customer Service Representatives/Supervisors.

The current PC Specs of CSRs are as follows:

    HP 8200 Elite SFF Core i7-2600
    3.40GHZ,
    8GB memory,
    1TB DVDRW,
    Windows 7 Pro 64bit

    In addition, each CSR has two computer monitors.

The current network specs for ALW Customer Service Division are as follows:

    - Gigabit network to the desktop - Windows 7
    - 25 Network nodes on private subnet
    - Internet: 50Mbos (up/down) Fiber - Current utilization is under 25%
    - Firewall: SSL-IPSec 3DES-AES VPN / VOIP Security / Bandwidth Management

The current Customer Information System is enQuesta Version 4 by Systems & Software.

B. General Features and Functions Required

ALW is seeking proposals for hosted solutions offering the following general features and functions:

1. Automatic call distribution (ACD) and Skills Based Routing
2. Interactive Voice Response (IVR)
3. Automated Attendant
4. Computer Telephony Integration (CTI) with scripting to display customer records
5. Voice Recording – with control settings
6. Voicemail
7. Call Back Messaging
8. Call transfer capabilities
9. CSR status display (busy, available, away)
10. Supervisor controls
11. Surveys
12. Reporting features in real time, scheduled, and customizable
13. Security and Reliability

C. Please provide overview of your proposed system and a description of the features and functions of your proposed system as outlined below.

1. System Overview

Provide a summary of the proposed solution and describe in detail the Vendor's product offering. Include an overview of the hardware, software, architecture and design, cloud environment, processes, management, implementation and support of the proposed solution to meet the requirements as described in this RFP. Include any additional functionality offered by the Vendor that is not a requirement of this RFP.

Describe the Vendor's expertise and experience in providing cloud-based phone systems to municipal utility customer service divisions.

Include:

a. Provide a description of the cloud-based call center or phone system environment.
b. How the Vendor's system accepts incoming calls currently routed through ALW's PBX.
c. Describe the Vendor's method for assuring Telephony Quality of Service (QoS).
d. Describe Vendor's service level guarantees that Vendor is willing to put into a SLA; include specific commitments or statements.
e. Describe the Vendor's standard process and timeline for any new system implementation.
f. Describe and provide a copy of the Vendor's training material, for administrators and end users.
g. Please provide illustrations of your proposed platform with detailed information regarding hardware and software requirements. Include any onsite configuration changes that would be essential for a successful implementation of managed solution including client software installations, servers, IVR, Automated Attendant, Predictive Dialer, databases, PBX etc.
h. Describe how many Customer Service Representatives (CSRs) can reasonably use the system at one time without any call quality degradation given ALW's network specifications and internet service level.
i. Provide the number of servers that would be required and any additional hardware /servers and software that might be required to store recorded calls.
j. Provide the topology of the proposed system, including all hardware, showing PSTN connectivity, LAN connectivity, and transport.

2. Main Features and Functions

Automated Call Distribution (ACD)

Describe how the Vendor's ACD solution addresses each of the features below:

a. Describe how the ACD solution provides for the ability to have Skills-Based call Routing.
b. Describe the number of skills that can be assigned per CSR.
c. Describe how a call can be rerouted if an CSR does not pickup the call.
d. Describe how many CSRs can be logged into the system simultaneously.
e. Describe the Administration and Supervision functions of your ACD features, including administering CSR login ID's.
f. Describe if and how CSRs can automatically be made available/unavailable immediately after each call.
g. Identify the procedures for transferring a call outside of the ACD.

h. Describe the capability to handle multiple ACD Calls.
i. Describe the capabilities for supervisors to monitor and observe CSRs by CSR ID, and join calls to talk, listen or monitor the entire customer experience.
j. Describe any other capabilities of the solution that would be of interest.

IVR Capability

a. Describe, in detail, the Vendor's IVR solution.
b. Is it an open system that can be integrated with other vendors' equipment? If yes, list the systems with which the Vendor's IVR can integrate.
c. Does Vendor support standard interfaces to other IVR vendor switching systems? If yes, list the standards supported by Vendor.
d. Describe the total capacity of the Vendor's IVR solution including self-service functionality.
e. Describe the telephony interface hardware.
f. Does the hardware support industry standards or is it proprietary in nature? Please explain.
g. Describe the capabilities to administer the IVR system remotely.
h. Describe the IVR management tool and the skill set required to utilize the tool.
i. Describe and provide screen captures to illustrate this interface.
j. Describe any other IVR capabilities of the Vendor's solutions.

Automated Attendant

a. Describe how the Automated Attendant provides single digit menu choice and the layers of depth to callers for automatic transfer.
b. Describe how the Automated Attendant supports automatic time of day, day of week, and holiday greeting changes.
c. Describe how the administrator can customize all Automated Attendant prompts, including offering callers a choice of language in which to hear the prompts.
d. The system must support multilingual prompts for which the system can offer users and callers a choice of languages. Describe this feature and list available languages.
e. Describe the voice prompting options such as professional voices versus in-house options for recording voice prompts.
f. Describe the options for "music on hold" as well as the Vendor's ability to include ALW messages to the "music on hold".
g. Describe any other Automated Attendant capabilities of the vendor's solutions.

Computer Telephony Integration (CTI)

a. Describe your CTI link features and capabilities.
b. Does your CTI solution integrate with databases of record?
   - What are the database access methods?
   - Can the Vendor provide a database solution in the event there is no integrated database of record, e.g. upload files with limited data from customer record?
c. Describe how your system can be configured to provide customer account information to CSRs when phone call is answered.
d. Describe how your system can be configured to provide customer record information, such as balance due, to customers.
e. Describe the Vendor's ability to provide text-to-speech and speech recognition applications.

<u>Voice Recording</u>

a. Describe the ability for supervisors to record CSR conversations, store those recordings and use a browser-based tool to retrieve and listen to the conversation at a later time.
b. Describe ability of CSRs to record malicious conversations.
c. Does your system provide ways to categorize the types of calls being recorded,?
d. What equipment, if any, is required to record calls?
e. Are call recordings stored on the network? For how long? How are these recording accessed?
f. Describe administrative tools and controls to record CSR conversations and settings to record conversations automatically and manually.

<u>Voicemail</u>

a. Describe the queuing options that allow callers to be provided options such as leave a message on a voicemail or remain in queue for a live agent.

<u>Callback Messaging</u>

a. Describe the ability to provide callers with queue positions and current wait times.
b. Describe the ability to give callers the option of leaving a message requesting to be contacted later, as opposed to waiting in queue for a live CSR.
c. Describe the method that will launch a call to an available CSR to deliver the call back message with the specified time and telephone number.
d. Describe the method used to launch the callback to the customer.
e. Describe the ability to distribute callback messages to available CSRs.
f. Describe the ability to receive messages after normal operating hours and route callback messages at start of business.
g. Describe any other callback capabilities of the Vendor's solutions.

<u>Call Transfer Capabilities</u>

a. Describe how the Vendor's system performs the following soft phone capabilities:
   ▪ Transfer
   ▪ Conference
   ▪ Speed dial
b. Describe how information flows if the contact needs to be transferred to another CSR (customer information with the contact type).
c. Describe how contact information is preserved during transfers when transfers are made across systems and disparate telephone networks
d. Describe how the system can avoid hard-phone and soft-phone synchronization issues.
e. Describe the ability for multiple calls to be taken by a representative, such as call center and direct extension calls.
f. Describe any other soft phone capabilities of the vendor's solutions.
g. Describe ability to reroute after hours calls to one or more cell phones.
h. Describe how the Vendor's system supports time of day routing.

<u>CSR Status Display / Workforce Optimization</u>

a. Describe how your system displays status of CSRs, on call, available, away from desk. Provide screenshots of CSR status displays.
b. Does Vendor system provide any forecasting ability to plan the staffing levels to accommodate projected call volumes?

Supervisor Controls

a. Describe the administrative and supervisor control features of your phone system, including controls for ACD call routing, supervisory and reporting functions, telephony features, and any additional call center applications such as call recording, and CTI.
b. Describe how the solution can be administered from a centralized point, or remotely.
c. Describe any other administrative tool capabilities of the Vendor's solutions.
d. Provide screen shots of the administrative tool.

Surveys

a. Describe any customer service survey tools offered by Vendor System to gain customer feedback on the quality of customer service provided by CSRs.
b. Does the survey tool provide skip logic based on the responder's answers?
c. Does the application provide feedback to the CSRs, as well as the managers?
d. Are the responders' comments transcribed?
e. How long is the data stored?
f. Describe key metrics reported by your survey tool?
g. What security permission levels can be customized with the survey tool?

Reporting Features

a. List and describe all reporting capabilities of system to generate scheduled reports, customizable reports, and real time reports
b. Describe any analytics used to evaluate historical trends and make forecasts.
c. Provide a sample of standard reports.
d. Can the reports be exported in different file formats?
e. How many standard reports are included in the reporting solution?
f. Describe any other reporting capabilities of the Vendor's solutions.
g. Provide screen shots of the reporting tool.

Security and Reliability

Describe the security features of the proposed solutions. Describe the Vendor's overall Business Continuity and Disaster Recovery process.

a. Does the Vendor have multiple sites to ensure uptime in case of an individual outage?
b. Does the Vendor use redundant power sources at the hosting facility?
c. Does the Vendor use redundant IP network solutions at the hosting facility?
d. Does the Vendor use redundant phone line sources at the hosting facility?
e. Does the Vendor have its equipment on backup battery power sources, in addition to generator power, in the event of a commercial power failure?
f. Is your Network Operations Center (NOC) manned 24 hours per day or staffed via page out?
g. Describe the Vendor's disaster recovery and failover processes. How frequently are these processes tested or updated?
h. Describe the ability to assure phone call delivery.

i. Explain your process for restoration of a failed hardware component in your telecom, IP and application network

j. Describe how the Vendor's solution affects the clients' IT/Telecomm infrastructure.

k. Describe any physical security for the proposed solutions.

Describe Vendor reliability guarantees and related SLA terms and conditions. Address the following issues:

a. Can Vendor provide a solution which is available 99.99% of the time per month and is Vendor willing to agree to contractual obligations and financial penalties for under performance?

b. What is your mean time to repair for priority 1 trouble tickets?

Other

Describe any other features or functions about your proposed system which you believe offer benefits to ALW that are not included in above. Any additional information about your system that ensures call quality would be appreciated.

D. Pricing and Cost Proposal

a. Describe the costing model structure for your solution. Is your pricing structure transaction based, licensed by the agent, or some other format?

b. As volumes increase it is expected that the costing model would decrease in price (i.e. by transaction or per seat price). Describe price point reductions for higher call volumes.

c. Describe the pricing for Telco usage charges.

d. Describe the 'base' system that is included in the costing model as well as pricing for additional functionality that is not included in the 'base' system.

e. Identify how supervisor and manager positions are built into the costing model.