

Request for Proposal
for
Contact Center Recording, Quality Monitoring
and Analytics Solution

[Company Name and Logo]

[Date]

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1. Introduction

[Insert Company Name], hereinafter referred to as "Company" has the following high level goals and expectations for this Request for Proposal:

[Company to provide a high level summary of project goals, as applicable.]

2. Instructions to Vendors

2.1. Timeline for this proposal

Date RFP Issued	[Insert date]
Final Date for Vendors to Submit Questions	[Insert date – should be at least 5 business days after RFP Issue Date]
Vendor Questions Answered	[Insert date – e.g. as soon as possible but no later than 5 business days after Final Date for Vendors to Submit Questions]
Vendor Proposals Due	[Insert date – e.g. 10 business days after questions are answered]
Vendor Presentations	[Insert date to fit your schedule]
Vendor Selection	[Insert date to fit your schedule]
Contract Negotiations Concluded By	[Insert date to fit your schedule]
Installation Date	[Insert date to fit your schedule – e.g. 30 days after contract signed]
Go Live Date	[Insert date to fit your schedule – e.g. 30 days after installation]

2.2. Questions regarding the RFP:

Please direct any questions regarding the RFP via email at by the date stated above as follows:

Contact Person: [insert name of contact person]

Email: [insert contact's e-mail address]

Answers to all questions submitted will be disseminated to all vendors responding to this RFP as above.

2.3. Submitting your response to this RFP:

Please submit your response to this RFP and any additional supplementary documentation to Company by the date stated above as follows:

Contact Person: [insert name of contact person]

Email: [insert contact's e-mail address]

Late proposals risk elimination from consideration.

2.4. Format of your response:

The proposal shall include an executive level overview. All questions in this document shall be answered in the order in which they appear. The numbering scheme shall be maintained. Each question shall be re-stated in its entirety and then followed with your response. Questions that are answered by simply referring to documents or promotional material will be deemed unacceptable. Additional material and/or documentation can and should be included with your proposal in order to clarify your responses but shall not be used to answer questions in their entirety. Include all supporting material as a separate section of your response.

2.5. Compliance

For each response, please indicate *full compliance*, *partial compliance* or *non compliance*. Note that for questions marked as MANDATORY, responses other than *full compliance* put the bidder at risk of elimination from consideration.

[Note: Company to mark relevant questions/sections as MANDATORY according to its needs.]

2.6. Conditions

2.5.1 Confidentiality:

This request for proposal belongs to Company and is strictly confidential. Any disclosures or reproductions of its contents must have the prior written permission from Company. If you will not be responding to this RFP, please return all materials to Company as soon as possible.

2.5.2 Costs:

Please note that all costs incurred by Vendor in responding to this RFP are to be born by Vendor and will be free of charge and without any obligations to Company.

2.5.3 Selection process:

After receipt of all proposals, Company will evaluate all responses. If necessary, we will contact you to adjust and/or clarify the details. Should Vendor be retained in the potential suppliers' short list, you will be required to make a presentation at Company's office in [city] during the time outlined in Section 2.1 above. This presentation will be at no cost or obligation to Company. The contract decision will be based upon, but not limited to, the best combination of price, terms, features, quality of service and product, company history and references.

3. Project Overview

[Company to fill in as much information as possible in these tables to allow Vendors to prepare relevant responses and quotations.]

3.1. Acquisition Environment

Number and location of contact center sites	[# sites; City A, City B, etc.]
Number of agents (by site)	[Site A: #, Site B: #, etc.]
Number of recorded seats (by site)	[Site A: #, Site B: #, etc.]
Number of supervisors (by site)	[Site A: #, Site B: #, etc.]
Preferred acquisition method	[e.g. trunk-side, station-side, VoIP, CMAPI/DMCC, duplicate media stream, combination, etc.]
If trunk-side, how many T1s (per site and per PBX)	[specify]
Environment incorporates tie-lines, dialers, IVR, etc.	[specify]
Environment requires data integration	[e.g. CTI link required - specify, information required to be captured from agent desktop, etc.]
At home agents	[yes, no]

3.2. Contact Center Environment

Average calls per day (by site)	[Site A: #, Site B: #, etc.]
Average call length (by site)	[Site A: # mins, Site B: # mins, etc.]
Days / hours of operation (by site)	[Specify]
Peak call volume per hour (by site)	[Site A: # calls, Site B: # calls, etc.]
Call type (by site)	[e.g. inbound, outbound, sales, service, etc.]
Free seating	[yes, no]

3.3. Application Information

Average evaluations per agent per week	[#]
Evaluations performed by	[e.g. agents' supervisor, team leader, quality analyst, independent QA evaluator, etc.]
Evaluations performed locally or remote	[local, remote, both]

Evaluation function centralized	[yes, no]
Organizational complexity	[e.g. # of levels of hierarchy from agent to contact center manager or paste/describe org chart below]
Specialized contact center training, coaching or quality roles/titles	[specify]
Agent self-evaluation required	[yes, no]
% agent screen recording required	[0% to 100%]
Wrap-up recording after call required	[yes, no, how long]

3.4. Existing Technology Environment

Telephony

ACD (by site)	[Site A: Make, Model, SW Version] [Site B: Make, Model, SW Version] [etc.]
Telephone Set Make/Model (by site)	[Site A: Make, Model, SW Version] [Site B: Make, Model, SW Version] [etc.]
Dialer Make/Model/SW Version (by site)	[Site A: Make, Model, SW Version] [Site B: Make, Model, SW Version] [etc.]
CTI Make/Model/SW Version (by site)	[Site A: Make, Model, SW Version] [Site B: Make, Model, SW Version] [etc.]

Network

Network type	[specify]
TCP/IP protocol support	[specify]
SNMP network manager type	[specify]
Network topology	[e.g. indicate firewall, bandwidth between sites / sub-networks, etc.]

Workstation Standard

Manufacturer	[specify]
Processor	[specify type, speed]
Memory	[specify]

Operating System/Version	[specify]
Browser Used	[specify]
Mail Server Used	[specify]
Multi-Media Speakers	[yes, no]

Server Standard

Manufacturer	[specify]
Model	[specify]

Other IT Environment

Storage subsystem vendors and types	[e.g. EMC Centera; SAN, NAS, DAS, etc.]
Backup and archive media	[specify vendor, make/model]
Environment roadmap	[Specify any future environment plans, e.g. outsourcing, at-home agents, VoIP, bandwidth and infrastructure upgrades, etc.]

4. General Information

4.1. Vendor Questionnaire

- 4.1.1 State the number of years your company has been in business.
- 4.1.2 Provide a brief summary of your company's history in the marketplace.
- 4.1.3 Where are your head office, sales, and customer service offices located?
- 4.1.4 How many employees are in your company? What percentage of these employees are in Research and Development? Customer Service?
- 4.1.5 What percentage of your revenues is dedicated to Research and Development?
- 4.1.6 How many seats of recording / quality monitoring do you have installed worldwide?
- 4.1.7 How many deployments and seats of speech analytics do you have installed worldwide?
- 4.1.8 Are you the developer of the proposed software solution or are you dependent upon third party software components (excluding operating system software, etc.)? Please highlight any components of the solution for which third party software components are required.
- 4.1.9 Provide at least three references that we may contact. For each reference provide names and phone numbers of the primary contact person.

- 4.1.10 Is your company financially stable? Please discuss your company's record of financial success.
- 4.1.11 Do any industry analysts follow your company? How is your company rated?
- 4.1.12 Please provide recent quotations from industry analysts.
- 4.1.13 Please list any recent (past two years) product recognitions or awards.

4.2. Vendor Corporate Vision

- 4.2.1 Please describe any features, services, or practices you provide in relation to the products requested which set you apart from your competition.
- 4.2.2 Please discuss your vision for this technology for the next three years.

5. Solution Characteristics

5.1. Call Recording Applications and Characteristics

- 5.1.1 Please describe your approach to recording.
- 5.1.2 Please describe your approach to quality monitoring.
- 5.1.3 Please describe your system architecture. Include a diagram.
- 5.1.4 Please describe your technology approach regarding storage of recordings.
- 5.1.5 What version of your product are you offering? Is this version generally available? If so, when did it become generally available? If any of the responses throughout this proposal are based on functionality that will only be available in a future release or are in a pre-release stage, please indicate the version it will be available in and the expected date of availability.
- 5.1.6 Please describe your technical solution approach for enterprise-wide access to recordings
- 5.1.7 If recordings are acquired at multiple sites (e.g. multiple call center sites, offshore locations, work-at-home agents, etc.) via multiple methods (e.g. TDM, VoIP, trunk side, station side, etc.) can a user access all recordings from a single site independent of where they originated or are stored?
- 5.1.8 If recordings are acquired at multiple sites (e.g. multiple call center sites, offshore locations, work-at-home agents, etc.) via multiple methods (e.g. TDM, VoIP, trunk side, station side, etc.) can analytics (e.g. speech analytics) be transparently run on all recordings without limitations?
- 5.1.9 What applications are supported by your proposed solution? Please specify any additional system components that are required to support each application cited that are not part of the proposed solution.
- 5.1.10 Does your solution provide an optional desktop application to allow agents to initiate and /or terminate recording (Record on Demand?) If so, does this option allow the addition of data fields to the call record that would be available as search criteria for call retrieval?
- 5.1.11 There shall be no limit on the number of agent positions that can be simultaneously recorded in accordance with evolving business requirements

and peak activity periods. Please detail your compliance with this requirement.

5.2. General Application Requirements

- 5.2.1 All end user and administrative application functions shall be provided in a unified, web-based interface. Please describe your compliance with this requirement.
- 5.2.2 Please describe how your end user applications are licensed. Does your proposal include enterprise-wide, unlimited user access or do you require incremental licensing?
- 5.2.3 The solution shall provide each user with a web-based customized, role-based User Interface for all application functionality. Please describe.
- 5.2.4 The web-based user interface shall present users with customizable dashboards, so that each user is presented the information that matters most to the job that he/she is performing. Dashboards shall include graphical reports, speech analytics results, data mining results, training course status, etc. Please show a sample of your unified User Interface and dashboards.
- 5.2.5 The solution shall provide users with a number of customizable workflows that will make it easier for them to perform their typical job functions. Please describe.
- 5.2.6 The solution shall not require ongoing scheduling for calls to be recorded. Company shall not be required to allocate administrative resources to maintain recording schedules for agents. Please describe your compliance with this requirement.
- 5.2.7 The solution shall be able to provide playback from any LAN/WAN attached workstation with audio delivery via the workstation or a telephone. Please describe.
- 5.2.8 The multi-media playback application shall be similar to the Microsoft media player and support standard playback features including:
- a) volume control
 - b) jump forward
 - c) jump backward
 - d) direct (slider-bar) access to sections of the recording
 - e) call visualization
 - f) call segment tagging and annotation

Please describe how your solution meets these requirements.

- 5.2.9 In addition, for calls that have been processed by speech analytics, the user shall be able to jump ahead to various points in the call based on words or phrases that have been highlighted by the speech analytics application.
- 5.2.10 Screen playback shall be fully synchronized with the audio, through any jumps or re-positioning of the playback – forward or backward. Please describe your compliance with this requirement.
- 5.2.11 The solution shall allow the user to re-size the screen playback window and to view it in parallel with the evaluation form. When doing so, the image

shall scale smoothly. This shall be applicable regardless of the resolution of the recorded screen or the desktop on which the playback is taking place. Please describe your compliance with this requirement.

- 5.2.12 The playback application shall provide instantaneous call retrieval for all contacts for the life of the system. No special "archive query" shall be required. Please describe your compliance with this requirement.
- 5.2.13 Real-time monitoring of synchronized voice and screens shall be provided. Please describe.
- 5.2.14 The playback application shall impose no restrictions or limitations on the number of users who can simultaneously access a single call record.
- 5.2.15 The solution's playback application shall allow an authorized user to download the audio and/or screen elements of the contact in a synchronized media file (e.g. AVI) for e-mail or embedding into any application? Non-authorized users shall not have the ability to do this. Please explain how security is assured.
- 5.2.16 The solution shall allow for automatic login authentication based on the underlying network operating system for ease of use and simplified administration/user management, rather than a separate user login to access the application.
- 5.2.17 Does the application provide a flexible "rule editor" to define business rules for recording control, storage management, workflow, etc? If yes, rules shall be able to include all CTI-provided contact data.
- 5.2.18 The solution shall provide a unified view of calls across holds, transfers, etc. including calls transferred from one center to another. Each segment of the recorded call shall be visualized separately but one-click cradle-to-grave playback shall be supported. Please detail your compliance.

5.3. Recording Environment

- 5.3.1. Does the solution support passive trunk side recording? Describe.
- 5.3.2. Does the solution support passive station side recording? Describe.
- 5.3.3. Does the solution support VoIP (Voice over Internet Protocol) recording? If yes, in what environments?
- 5.3.4. Does the solution support the Avaya DMCC (formerly known as CMAPI) standard for recording via switch vendor API-enabled VoIP delivery?
- 5.3.5. Does the solution support the Nortel XXXX standard for API-enabled VoIP delivery?
- 5.3.6. Does the solution support recording in mixed environments for trunk-side, station-side and VoIP recording?
- 5.3.7. Describe your migration strategy for customers migrating from traditional telephony to VoIP.
- 5.3.8. The solution shall support unlimited expansion of the number of trunks, stations, or VoIP contacts that can be recorded. Describe.
- 5.3.9. The solution shall provide scalable screen recording. Please describe any system limitations on screen recording capacity.

- 5.3.10. Can your solution record screens natively in a Citrix or Terminal Services environment?
- 5.3.11. At what compression does the proposed solution store voice and screen recordings?
- 5.3.12. Are voice and screen recordings saved in standard file formats or are they proprietary?
- 5.3.13. Can the recordings be played back from any Windows workstation? What software is required?
- 5.3.14. List the PBX/ACD vendors for which you provide Computer Telephony Integration (CTI) support. Please describe your current support as well as your approach to maintaining up-to-date support as vendor environments evolve.
- 5.3.15. Are any of your applications dependent on the recording environment or recording approach proposed? Please list all dependencies between your applications support and recording environments.

5.4. Quality Monitoring (QM) Application

- 5.4.1. For each recorded contact, the QM solution shall provide access to all segments related to that contact for "cradle-to-grave" review, including both audio, and, where relevant, screens.
- 5.4.2. The QM solution shall incorporate advanced workflow, including an intelligent inbox so that supervisors / quality specialists and customer retention / customer experience specialists have automated access to the correct contacts WITHOUT the need to execute search queries.
- 5.4.3. It shall be possible to have calls automatically routed to the intelligent inbox of an evaluator, based on a quota of evaluations per agent. This should eliminate the need for Company to prepare evaluation schedules for its evaluators.
- 5.4.4. It shall also be possible to have calls automatically routed to intelligent inboxes of users such as evaluators, quality analysts or business analysts based on the following criteria:
 - a) Date and Time
 - b) Extension
 - c) ANI
 - d) DNIS
 - e) Agent Name/ID
 - f) Call Length
 - g) Call ID (switch or middleware provided)
 - h) CTI "private data" (e.g. SSN, account number, claim number, etc.)
 - i) User annotated data (e.g. tagged call)
 - j) Line of business, where line of business is determined by the system based on such criteria as DNIS, agent group, etc.

- k) Speech analytics category (e.g. calls should be categorized by speech analytics, and then based on the tagged category routed to the intelligent inbox).
 - l) Screen analytics data (e.g. data captured by screen analytics from the agent's desktop environment)
- 5.4.5. It shall also be possible for users to search for calls on an ad-hoc basis. Call search criteria shall include items a) through l) listed above in 5.4.4.
- 5.4.6. Assume that we wish to route calls that do not meet first call resolution objectives to a user such as an evaluator, quality analyst or business analyst. Explain the process by which the system identifies calls with first call resolution issues, and the process by which these calls are automatically routed to relevant parties.
- 5.4.7. Please describe how your solution gives contact center managers tools to distribute or share monitoring workload across supervisors.
- 5.4.8. The QM solution shall present evaluators with a single unified screen that includes audio and screen capture playback as well as the evaluation form. Please describe your compliance with this requirement.
- 5.4.9. The QM solution shall provide flexibility to handle complex question types. Please describe what type of questions your solution supports.
- 5.4.10. The QM solution shall improve efficiency in filling out forms. Please describe the features that your solution supports in this area.
- 5.4.11. The QM solution shall provide flexibility in scoring. Please describe the features that your solution supports in this area.
- 5.4.12. The QM solution shall make workflow easier. Please describe the features that your solution supports in this area.
- 5.4.13. The QM solution shall provide quality data to supervisors and contact center managers in a time and manner that is actionable.
- 5.4.14. The solution shall provide real-time agent monitoring.
- 5.4.15. The solution shall provide tools for agent coaching and training.

5.5. Reporting

- 5.4.1 The proposed solution shall include as a standard a completely integrated reporting package. Please describe your reporting package.
- 5.4.2 The reporting package shall provide instant access to key metrics, including "drill down" for additional detail as part of the application.
- 5.4.3 The reporting package shall include a full set of productivity and quality reports. Please provide information about your standard reporting templates.
- 5.4.4 The reporting package shall include analytic reports, charts to provide operational, quality, and customer-intelligence performance management data in easily visualized presentations.
- 5.4.5 The reporting package shall provide flexible trending over time reports for different metrics in the contact center.

- 5.4.6 Reports shall be available that enable users to track information related to all of the applications mentioned in section 5.3.1 above. Please describe.
- 5.4.7 The solution shall preferably be based on an industry-standard reporting framework. Please describe the reporting framework that is used as the basis for the reports.
- 5.4.8 The solution shall support displaying rolled-up information at any level in the organization (e.g. agent, team, group, contact center, Line of Business, etc.). Please describe.
- 5.4.9 The reporting package shall support comparing metrics across different call attributes. Example of call attributes are the Line of Business the call is associated with, or the site / contact center that took (or placed) the call. Please describe the call attributes that the system supports. Please indicate if these call attributes are fixed or if the user can define call attributes based on business needs.
- 5.4.10 It shall be possible to display reports in graphical as well as textual manner. Please describe the options the user to control report display.
- 5.4.11 It shall be possible to generate reports on-demand or to schedule reports. Please describe the various report generation options offered by the system.
- 5.4.12 It shall be possible to define various destinations to reports, such as e-mail addresses, user's folders, FTP locations, etc. Please describe the options the system offers for sending reports and sharing them with other users.
- 5.4.13 It shall be possible to export reports to various standard formats, such as RTF, PDF, etc. Please describe the report formats supported by the system.
- 5.4.14 It shall be possible to compare reported metrics to a peer (or reference) agent or group. Please describe how this is supported in the system.
- 5.4.15 It shall be possible to define filters on reports, such as time, agent, group, DNIS, etc. Please describe the filters supported by the system.
- 5.4.16 It shall be possible to define the order by which the report is generated (e.g. display lowest-scoring agents). Please describe the options the system offers for sorting data.
- 5.4.17 The system shall support defining ad-hoc and customized reports by the user. Please describe what facilities the system provides for ad-hoc or customized reports. Please indicate the technical skills needed for generating ad-hoc or customized reports.

5.6. Analytics

- 5.5.1 Please differentiate your product and services from your competitors and provide information regarding the multiple features/facets of your speech analytics solution that Company will benefit from.
- 5.5.2 The solution shall support the automatic categorization of contacts based on spoken keywords or phrases. Please describe the process by which categories are built, any tools that exist for building categories, and the amount of time that is typically required to build effective categories.
- 5.5.3 The solution shall support ad-hoc or "serendipitous" search for contacts based on spoken keywords or phrases.

- 5.5.4 The solution shall not require keywords and phrases to be predefined (i.e. defined prior to processing by the speech engine).
- 5.5.5 Does the solution perform automated root cause analysis to surface key issues impacting contact center and enterprise performance? Please describe your approach and any user requirements.
- 5.5.6 What is the dictionary or vocabulary size that the system can perform ad-hoc word or phrase searches on at any one time?
- 5.5.7 Is the transcription of the call available, and, if so, what is the process for accessing this information?
- 5.5.8 All analytics capabilities and output shall be fully integrated within the proposed solution and shall be completely accessible from the unified application suite. Please describe your approach and any user requirements.
- 5.5.9 The solution shall include integrated data mining capabilities that can spot positive and negative correlations between various contact center metrics and data. Please describe.
- 5.5.10 The solution's data mining capability shall automatically uncover trends in contact center performance and suggest root cause of these trends. Please describe.
- 5.5.11 Are the analytics solutions you offer preset or customizable? Please describe the process of customization if such is needed? Is there any "out of the box" functionality?
- 5.5.12 Are the analytics capabilities developed in house or by a third party?
- 5.5.13 What level of user permissions and access rights do the analytics applications include? Do they support the same security, user permission and group definitions of your quality monitoring solution?
- 5.5.14 Screen Analytics capabilities shall be available to automatically capture and analyze agents' on-screen actions and data entering. This data shall be correlated with the calls in order to identify trends in contact center performance. Please describe your approach, and detail any integration or user requirements to implement the solution.
- 5.5.15 The solution architecture shall enable introduction of future analytic technologies without affecting the system's behavior or performance. Please describe your approach and any user requirements.
- 5.5.16 Please describe successful implementations of your analytics offerings with at least three examples of customer sites with contact names and addresses, and telephone numbers.
- 5.5.17 Provide a success story detailing how one of your customers benefited from speech analytics. Please be sure to indicate ROI or financial benefit to the customer.

5.7. User Administration

- 5.7.1. All administrative functions shall be easily accessed from a single, web-based interface. Please describe.

- 5.7.2. The solution shall include a user administration capability that supports flexible organizational hierarchies, so that the structure of users and groups can be matched to the structure of our organization. Please describe.
- 5.7.3. The user administration function shall include multiple levels of permissions to allow for the precise control of users' visibility (i.e. what data users can see). Please describe.
- 5.7.4. The user administration function shall include multiple levels of permissions to allow for the precise control of users' rights (i.e. what users can do.) Please describe.
- 5.7.5. The task of user management shall be able to be distributed according to the Company's organizational structure. In other words, the highest level user administrator should be able to sub-assign user administration tasks to others in the organization. Please describe.

5.8. Performance Management

- 5.8.1. How does performance management improve customer metrics ~ e.g. Customer experience, satisfaction, retention, etc.?
- 5.8.2. How can Performance Management address both contact center and back office processing areas?
- 5.8.3. How will you "benchmark" performance during implementation to ensure that performance is incrementally improving?
- 5.8.4. Does your implementation result in a measurable ROI? If so, how is it measured, and what type of risk sharing do you offer in your agreement?
- 5.8.5. What is your change management methodology and how is it deployed?

5.9. Platform Requirements

- 5.9.1. The solution shall be a LAN/WAN based system with all system communication via standard protocols like TCP/IP.
- 5.9.2. The platform shall utilize a layered / tiered architecture such that new interfaces, media streams, and applications can be incorporated without a "forklift" upgrade. Please identify the distinct layers within your solution and where those layers live in the physical deployment of your solution.
- 5.9.3. Please describe the scalability inherent in the platform design to accommodate both initial systems sizing as well as growth.
- 5.9.4. Please describe the largest implementation of a single instance of your solution.
- 5.9.5. The platform shall utilize standard service layer protocols (e.g. Web Services) with no direct communication between user applications and system servers (database, recording devices, etc.). Please describe your compliance with this requirement.
- 5.9.6. Please describe how your platform can be deployed in a centralized model so we can make use of existing technology infrastructure and personnel. Please detail where each system component will live when deployed in our environment.

- 5.9.7. Please identify any proprietary components of the system that cannot be purchased directly by Company from other sources.
- 5.9.8. The solution shall include browser-based applications for playback, evaluation, etc.
- 5.9.9. The application solution shall include browser-based administrative applications for user administration, etc.
- 5.9.10. The recording solution shall be scalable to support recording for tens of thousands of agent positions in any configuration of sites. Please describe how your platform scales both up and out.
- 5.9.11. The proposed system shall be able to support an unlimited number of user/playback workstations. Please indicate if additional licensing is required when adding additional users to the system.
- 5.9.12. All servers shall utilize commercially available hardware in either turnkey or customer provided hardware configurations.
- 5.9.13. The proposed platform shall provide high availability and fault tolerant options including RAID 5 storage and redundant power supply.
- 5.9.14. The proposed platform shall incorporate a relational database for the management of contact-related data and indices. This database shall be scalable to support millions of on-line records. Please describe how your solution meets this requirement.
- 5.9.15. The proposed platform shall include fully autonomous system fault alarming capabilities in addition to providing support for SNMP managed alarming.
- 5.9.16. Please describe your policy for allowing 3rd party IT applications for server management, antivirus, etc. on your platform.

5.10. Security

- 5.10.1. The proposed solution shall utilize a services layer (e.g. Web Services) to isolate all end-user applications from direct-access to servers, databases, stored media, etc. at the operating-system level. Describe your compliance.
- 5.10.2. User authentication shall be fully integrated with Windows Networking. The solution shall provide a single network login, full support for all security policies and devices supported by Windows, etc.). There shall be no requirement for recording-system-specific users and passwords. Any Windows-compatible security software and/or device shall be supported without custom integration. Please describe your compliance.
- 5.10.3. All end-user login, query, and playback activity shall be fully audited. Audit logs shall be in a format that can be easily imported into tools such as Microsoft Excel for analysis. Please describe.
- 5.10.4. The solution shall include an extensive set of access control mechanisms including selectively limiting access to applications and application features (playback, download, evaluation, etc.) Please describe.
- 5.10.5. The solution shall include filters that are settable per user to limit access to contacts based on any contact-related data – e.g. agent, extension, DNIS, ANI, etc. Describe your compliance.

- 5.10.6. The solution shall rely only on industry-standard communication protocols, web servers, storage, etc. Detail your compliance with this requirement.
- 5.10.7. The solution shall be compatible with firewalls, Network Address Translation, and other IP-network security features. Please describe.

5.11. Storage

- 5.11.1. The solution shall provide unlimited online, near-online, and offline storage capability in any combination. This capability shall meet our current, as well as future storage needs. Please describe how your offering meets this requirement.
- 5.11.2. Company desires an open storage platform that can provide instant access to any recording with any amount of on-line storage desired. The solution shall leverage any Networked-Attached Storage (NAS) or Storage Area Network (SAN) solution utilized now or in the future. Please describe.
- 5.11.3. Looking towards the future, the solution shall be compatible with any standards based storage technology, including next-generation technologies such as iSCSI, when they become available. Describe your solution's compliance.
- 5.11.4. The proposed solution shall include an automatic archive/backup function that supports archive to any media/device supported by Windows. Please describe.
- 5.11.5. The solution shall utilize only industry-standard file-formats (such as WAV or AVI) and codecs (such as G.723.1.) Please describe.
- 5.11.6. The solution shall be capable of leveraging hardware and software storage solutions from industry leaders such as EMC, IBM/Tivoli, etc. and be capable of utilizing any commercial storage subsystem and media type (optical disc, DVD, tape, WORM) with no proprietary storage/archiving solutions. Please describe.

5.12. Cost of Ownership

- 5.12.1. Please describe how your system addresses and minimizes ongoing cost of ownership. Include descriptions of contributing factors in system architecture, administration and maintenance.
- 5.12.2. The solution shall be available as "software-only" for deployment on existing IT infrastructure (servers, network, storage, etc.) Describe your solution's compliance.
- 5.12.3. The solution shall utilize industry standards for database access, network communications, file formats, storage subsystems, etc. to allow leveraging of standard IT maintenance skills. Describe your solutions compliance.
- 5.12.4. The proposed solution shall include an API that allows external applications to control recording and updating of contact data. Please describe.

5.13. Multi-Site Solutions

- 5.13.1. Describe how the solution supports centralization across multiple remote sites.
- 5.13.2. Does the solution support autonomous recording at every site in the event of network disconnection. For what period of time?
- 5.13.3. The solution shall support centralized storage of data records at the enterprise level that can leverage existing IT infrastructure. Describe your compliance with this requirement.
- 5.13.4. Describe how the proposed solution allows for a flexible, evolving mix of local and remote sites. Describe any effects on the solution when moving, removing, or adding sites.
- 5.13.5. The solution shall support a combination of distributed and centralized storage architectures for maximum ROI and solution robustness – including ability to evolve the storage strategy over time without affecting existing sites or hardware. Please describe your compliance with this requirement.
- 5.13.6. Support for the configuration and health monitoring of all sites shall be available from a single location. Please describe.
- 5.13.7. The solution shall provide access to recordings from any site, regardless of the site they were recorded in. Please describe how this requirement is addressed.
- 5.13.8. The solution shall provide access to evaluations from any site, regardless of the site these evaluations were created. Please describe your compliance with this requirement.
- 5.13.9. The solution shall provide workflow across sites. Please describe your compliance with this requirement.
- 5.13.10. The solution shall provide reporting across sites. Please describe your compliance with this requirement.
- 5.13.11. The solution shall support centralized user administration across sites. Please describe your compliance with this requirement.
- 5.13.12. The solution shall support sites that span across multiple time zones. Please describe how the system handles multiple time zones. Please describe the way in which data from multiple time zones is displayed to users.
- 5.13.13. Please provide examples of customers using the same centralized multi-site architecture with the software versions proposed in your response to this RFP and describe the deployed solutions, including architecture diagrams.

6. Customer Services

6.1. Implementation Services / Project Management

- 6.1.1. Please describe a typical installation of your solution.
- 6.1.2. How long does a typical installation require?
- 6.1.3. Please describe the project team that will be assigned to our project including all aspects of the team's experience and qualifications including educational

background, professional training, technical certifications and professional experience.

- 6.1.4. Will you provide a single, dedicated Project Manager for our full implementation?
- 6.1.5. Please describe your approach to quality and any associated quality certifications/professional affiliations that the company maintains.
- 6.1.6. Please describe your measures of project success and provide supporting metrics outlining your current project success rate.
- 6.1.7. What kinds of resources are required of our company?
- 6.1.8. Identify two large installations that were conducted by your implementation team within the past year and describe each of the following aspects of the project:
 - Describe the installation in terms of the number of contact centers covered, number of agents recorded, number of supervisors using the system, length of deployment project, etc.
 - Describe in detail the project management processes put in place to ensure the implementation was conducted on time to meet the customer's live dates.
 - Describe the critical activities and personnel assignments within the associated project management process.
 - Provide a detailed project plan that reflects the activities for such a large scope project.
 - Describe the most challenging technical and management issues faced in these large deployments and what was done during the project life cycle to minimize risk in these areas.
 - Provide a contact name for each of these site implementations that can be used as a reference for your organization.

6.2. Educational Services

- 6.2.1 Please describe a typical training program.
- 6.2.2 What additional user training is available?
- 6.2.3 Can training be customized to meet special needs?
- 6.2.4 Will you conduct a discovery process prior training to understand our business, our processes and goals?
- 6.2.5 Will training be conducted on a system that operates off factory defaults or will it be customized to reflect our business processes, terminology and preferences prior to training?
- 6.2.6 Is training hands-on?
- 6.2.7 Is training provided at a training facility or on-site? If at your location, please provide details of the facilities.
- 6.2.8 What continuing education offerings are available after the initial deployment phase? Do you offer monthly/quarterly web sessions?

6.2.9 Do you offer on-site cutover support?

6.3. Consulting Services

6.3.1 Do you offer business case development services?

6.3.2 What consulting services can be provided to ensure that the system implementation is aligned with our corporate processes to achieve the maximum ROI of the solution?

6.3.3 Please describe any consulting services that are designed to address the areas of coaching to improve agent performance.

6.3.4 Describe consulting services that extend beyond the contact center to align the solution's analytic capabilities with enterprise goals, strategies, and processes.

6.4. Professional Services / Customization

6.4.1 What types of professional development services are available?

6.4.2 What services do your existing customers most commonly use?

6.5. On-going Applications Support

6.5.1 Do you provide a dedicated application help desk where users can get answers to application inquiries?

6.5.2 Do you offer quarterly visits to ensure users are using the application effectively?

6.5.3 Do you offer one-on-one coaching sessions?

6.6. Support Policies / Service Level Guarantees / Maintenance Policies

6.6.1 Is customer support provided by vendor or by a third party organization?

6.6.2 Please describe your customer support organization and capabilities.

6.6.3 Please describe the qualifications of your support team including educational background, product training, technical certifications, professional training and industry experience.

6.6.4 Do you have a 24-hour/day communication center? If yes, can this center be reached via a toll-free call?

6.6.5 Do you have a help desk? If yes, where is it located? What level of support does your help desk provide?

6.6.6 Do you have field offices that are available to assist in the event of a problem? Where are the field offices located?

6.6.7 Describe in detail the process for handling high severity issues. Please discuss the support escalation process, dispatch process, and management escalation process.

- 6.6.8 Please provide metric data that best describes your organizations ability to remedy high severity issues.
- 6.6.9 What is your guaranteed response time for user support?
- 6.6.10 What is your software maintenance & support policy? Please provide a copy of the agreement.
- 6.6.11 Is remote diagnostic support available? What secure remote access options are supported?

6.7. Upgrade Policy

- 6.7.1 Please describe your policy for system upgrades and service pack releases.
- 6.7.2 Are upgrades and service packs included under warranty?
- 6.7.3 How often are upgrades and/or service packs released?
- 6.7.4 How are customers notified of new releases?

7. Pricing

7.1. Pricing Format

Please provide a separate Pricing document as an attachment to your response. This document shall include the following:

- Provide per seat licensing costs for all software required to meet the requirement of this Request for Proposal.
- Provide all associated hardware costs that will be incurred by Company to meet the requirements of this Request for Proposal whether from recording vendor directly or from third party suppliers.
- Provide all pricing required for installation of the proposed solution.
- Provide all costs for training.
- Provide pricing for one year of maintenance.
- Provide pricing for any options not included in the required pricing that you feel may be of benefit to Company.