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**CX telephony RFP sample**

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# Introduction

Introduce your company to the Parties - about, size, locations and the products used today to provide services or sales that are under evaluation in this RFP. Detail all applications used currently, including customer channels. Talk about why you have entered into the RFP process, what isn’t working today and what new services do you want to provide for your customers.

# Response Guidelines

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

{Enter the Contact Information of the Person compiling the RFP for your ORG}

(please use the Subject line “RFP: Contact Centre Platform: Company Name”)

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

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

# Evaluation and Selection

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

## Product Feature Demonstration Presentations

Each recipient of this Request will be asked to participate in a product feature demonstration presentation of their product offerings. Following the evaluation of responses to this RFP, one or more leading candidates will be invited to meetings for evaluation by 'Company Name'.

## Selection

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

## Use and Disclosure of Information

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

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

## Vendor Costs

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

# Vendor Response

## Vendor Overview

* What is your company’s legal name, address, phone number, and URL? Provide the date and state of incorporation.
  + Legal Name:
  + Address:
  + Phone Number:
  + URL:
  + Date & State of Incorporation:
* Provide the name, title, address, telephone number, fax number, and email address for the person submitting this proposal.
  + Name:
  + Title:
  + Address:
  + Phone Number:
  + Fax:
  + Email:
* Briefly describe your organization. Include the following:
  + Business background and history:
  + Ownership structure:
  + Subsidiary relationships:
  + Funding, Acquisitions and/or mergers:
  + Number of years in the Contact Centre Platform business providing the service(s) proposed in this RFP:
  + Number of customers using your products:
* Write a few paragraphs on what are your top competitive advantages as a company and for the service(s) proposed in this RFP, for example?
  + **Innovation**
  + **Platform & Integrations**
  + **Partnership**
  + **Support**
* Specific to the services covered in this proposal, are any of the services delivered via a subcontractor partner?
* 'Company Name' requires {Enter your Payment Terms} Payment Terms. Do you provide other payment terms?

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## Implementation

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

**Example project phases:**

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

## Support, Maintenance and Upgrades

1. Describe the ongoing relationship management between you and 'Company Name'
2. How do we engage with your support team?
3. Please explain the flow of customer support when an agent needs same day assistance?
4. Please explain your ticketing process - what is your SLA for response times to tickets? Is a managed services provider involved?
5. How do you manage support tickets?
6. Do you have 24x7 live support options for post-deployment technical questions and issues?
7. Provide documentation on your support and training service offerings for both implementation and post deployment.
8. Are any fees required to obtain new releases?
9. How are new releases and changes tested?
10. What is your fee structure for support? Please explain if recurring, usage based, or lump sum
11. Please explain in detail the structure of your on-going post-sale support.
12. Are there tiers to your support?
13. What methods of communication do your support teams rely on with your clients?
14. How is first-line support provided to your customer’s agents and supervisors - do they reach out to your IT team or another internal resource? Please explain.
15. Is all support and service handled in-house? Please explain.
16. What is your CSAT rating for your support team?

## Architecture / Hosted Services

1. Describe your architecture and resilience. Where is the platform hosted? Is it centrally hosted or geographically distributed? Please provide a map or list of dataCentre hosting locations.
2. Describe, in detail, the user provisioning and de-provisioning features of your solution.
3. Do you have a public API? Provide API documentation and specific examples of how your product API will meet our integration needs.
4. What is your overall system availability and response time SLA? How is it measured? Describe the types of real-time performance & availability monitoring and how you monitor and manage SLA results?
5. Show how High Availability (HA) is achieved with your product or service. Do you run your service active/active across multiple data Centres?
6. Describe how you provide geographic redundancy in your dataCentre infrastructures.
7. The Contact Centre Platform implementation is expected to be primarily, if not exclusively hosted in the cloud. Please specify any HW/SW components which need to be installed on-premise.
8. If your service is delivered as SaaS, are you multitenant?
9. Do you have a platform status page where we can see the current state of the service and any service degradations or outages? Please include the link and provide the last six months of status details.
10. Please specify if any countries in the RFP are not available with your platform.
11. Does the vendor develop and maintain the platform solution in-house or does it resell another vendor’s solution? Please elaborate if there is a local carrier partner involved.
12. Can you provide a Voice Quality SLA?
13. Is this technology SAML-compliant so that it can be integrated with the 'Company Name' platform for identity management of 'Company Name' users?

## Security

1. Provide Security Policy documentation to include disaster recovery, InfoSec policy, incident management, notifications etc.
2. Have you completed third-party vulnerability scans and penetration test results from within the last 12 months.
3. Which security certifications do you hold(SOC, ISO, PCI-DSS etc)?
4. Describe your physical and virtual security
5. Describe your data encryption features of the system.
6. Does your system provide an audit report of personnel access to systems and data?
7. Describe your user access
8. What type of setup and administration is required? Can end–users administer day to day security moves/add/changes?

**Privacy**

1. Does your company follow GDPR standards?
2. Provide some information about what is done regarding GDPR compliance.
3. Do you have a Data Processing Agreement that can be signed for GDPR?

## Feature Requirements

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

### Core CCaaS Platform

1. Describe where your platform can add value.
2. Describe your integration capabilities to CRM applications.
3. Describe your abilities to integrate to third party products.
4. Describe your capabilities to do call routing.
5. Describe capabilities for cold transfer, warm transfer, agent/customer interaction while on hold with alternate department/person.
6. Does your platform offer call recording capabilities? Where are the calls stored? How long can we retain our call recordings? Are there any fees associated with call recording storage? Can recording be split by outbound/inbound?
7. Does your platform offer quality management for call recordings?
8. What type of live monitoring capabilities does your platform offer? Please explain the whisper, barge, monitoring features and capabilities.
9. How does an admin user make changes to IVR flows and configurations? Please provide a screenshot of the user interface and walk through the typical process.
10. How often is Professional Services needed to help us make IVR configuration changes? How long does this typically take?
11. Is there an ability to define inbound/outbound number depending on area of work? Please explain
12. Describe reporting capabilities, especially "real-time" call-Centre metrics and ability to integrate real-time data with CRM and other business systems (ie: BI Tools, WFM Tools, Slack, etc).
13. Describe what KPI dashboards are native to your telephony solution
14. What type of post-call survey functionality do you offer through your platform? Please explain the channels leveraged and the settings we can select from for frequency, etc.
15. Can you customize the questions asked in the post-call survey? Please explain.
16. How and where is survey data stored? Can we report on the results within our CRM? Please explain.
17. Can we set up triggers to alert management when poor survey results are submitted for follow-up? Please explain.
18. How are numbers provisioned for our business? Can these be local to our client base? Please explain.
19. Does your platform have built-in Virtual hold/Callback for holding customers' place in queue? Please explain
20. What outbound dialling capabilities does your platform have.

## Additional Features

Provide a detailed list of additional products and offerings that are in your product suite. Include the baseline functionality of each product listed.

**Mobile Context:**

1. Does your platform allow for click-to-call dialing from a mobile app or website? What data can be shared from the app/website with the agent so they can have more information about the customer journey before the call began? Please explain.

**QA/Voice Analytics:**

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

**WFM/WFO**

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

**Partner Applications**

1. Does your platform have a partner ecosystem of additional functionality and offerings pre-integrated with the solution that we can add on over time? Please explain the process of adding and implementing partner capabilities.
2. Do you offer trials of the partner solutions to see if they meet our needs and requirements?

**Pricing Instructions**

Based on the information provided in this Request For Proposal, please provide your

recommended system configuration, pricing, and any other relevant recommendations for your

company.

The following items must be easily identified for analysis:

1. Recommended configuration and price (up front and recurring). Pricing should be inclusive of all licenses, software, transactional fee’s i.e. minutes); and should clearly identify the cost of support and maintenance. If there is a step function in pricing, please be clear at what point each step occurs and what drives each pricing step.
2. The Vendor is responsible for identifying and providing the functionality and cost of each line item. The vendor must identify both one-time non-recurring charges like implementation and setup fees as well as ongoing costs including but not limited to maintenance, support, licenses
3. Pricing must include installing and configuring all software proposed for your solution.
4. Please note your ability to meet the timeline for implementation as outlined in the implementation section.

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

## Customer References

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

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| --- | --- |
| **Company Reference 1** |  |
| Company Name |  |
| Company Address |  |
| Company Industry |  |
| Company Contact |  |
| Company Contact Email |  |
| Company Contact Telephone |  |
| Company Contact Title |  |
| How long on System? |  |