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Unified Communications as a Service (UCaaS)

**Sample** Request For Proposal

For

**xxxxxxxxx**

Proposal Release Date: \_\_\_\_\_\_\_\_

Proposal Due Date: \_\_\_\_\_\_\_\_

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# **Xxxxxxxxxx Group Requirements**

## **1. Intention of the RFP**

Xxxxxxxxx Group is conducting this strategic sourcing initiative to evaluate options for a Unified Communications as a Solution (UCaaS) from qualified respondents. The response to this RFP should include your best offer to provide the systems and services described within this document.

The purpose of this sourcing event is to:

* Present Xxxxxxxxx Group ’s current situation
* Solicit your recommendations and solutions, to better understand your company and your capabilities in this space
* Review responses and determine which supplier best meets our needs going forward

## **2. Xxxxxxxxxx Group Contacts**

Vendors may contact Xxxxxxxxx Group for any questions related to this RFP. Telephone calls are permitted, however, verbal communications are not binding and should not be relied upon until confirmed in writing.

Your primary contact will be Xxxxxxxxx Group to whom all communication should be passed through first.

Direct communication with any person at Xxxxxxxxx Group regarding this RFP is not permitted without prior consent.

## **3. Proposal Delivery Requirements**

An electronic copy of the RFP and response documents is sufficient. Vendors are solely responsible for ensuring timely receipt of their responses.

Deliver an electronic copy to the following individuals:

Xxxxxxxxx Group

## **4. Schedule of Events**

|  |  |
| --- | --- |
| **Dates** | **Activity** |
|  | RFP distribution |
|  | Vendor response of Intent to Bid |
|  | **Responses Due** |
|  | Vendor Demonstrations, if necessary |
|  | Decision Award |
|  | Final Negotiations and Contract signed |
|  | **Tentative Cutover into Production** |
|  | **System Live** |

## **5. Company Description**

Xxxxxxxxx Group Background input here

## **6. Current Telephony/Communications Environment**

**Current Locations**

Xxxxxxxxx Group input

Example:

* UK locations
* Off-Shore Locations
* Planned Off-Shore Locations
* Do locations interact or back-up each other?

**Current General Environment**

Xxxxxxxxx Group input

Example:

Number of Agents/Representatives (Peak + Concurrent for CC) and users of Telephony/Communications services

* Traditional in-house Office/Center
* Remote Workers who need access to CCaaS and/or UCaaS platforms

Contact Center Current Systems

* CRM System(s)
* Do you access more than 1 CRM Platform? If yes, please provide the following on each:
* Version (e.g., 3.4)
* Cloud or Premise based
* Open APIs

**Challenges with current Unified Communications/Telephony System**

Xxxxxxxxx Group input

Example: The primary concerns with the current technology consists of the following:

* Multiple communication tools and multiple vendors doesn’t facilitate ease of use, collaboration and adoption.
* Inability to properly support remote workers (e.g., field sales & support, off-site knowledge workers, etc.)
* The platform lacks redundancy elements at each location leaving the company vulnerable to any sort local outage incident
* Lack of flexibility
* Inability to quickly deploy new functionality
* Inability to scale up or down to meet individual needs of the business
* Cost model is unpredictable

**Current Unified Communications Volumes (by each site/location/center)**

Xxxxxxxxx Group input

Example:

* Inbound Phone
* Outbound Phone
* E-mail
* Chat
* SMS
* Social Media
* Conferencing/Collaboration Needs

## **7. Evaluation Criteria**

Xxxxxxxxx Group will base its decisions regarding responses to this RFP on the following criteria.

Xxxxxxxxx Group input

Some Examples for Key Decision Criteria:

• **Financial viability and strategic direction**. The Bidder of the proposed solution must be financially viable, capable of sustained ongoing support and development of the solution proposed.

• **Investment** **Protection**, ensuring the capital investment provides flexibility in adapting future changes in technology.

* **Efficiencies at the desktop,** helping users and supervisors communicate better and work more productively at the desktop or other endpoints, regardless of location.
* **Common applications**
* Permit addition and integration of business applications.
* Support modular growth in capacity and feature functionality.
* **Effective Analytics tools**
* **Business Continuity**, UCaaS solution ensures business continuity by having a robust and highly resilient solution designed to provide seamless and uninterrupted service, with no loss of reporting or real-time capabilities in the event of hardware and/or network outage.
* **UK based service**, data centres and a UK centric Account Management & support team.
* **Unlimited Outbound Calling minutes** with all license types (within the UK as a minimum) to aid in the predictability of ongoing telephony expenditure
* **Ability to ‘mix and match’ license types** to ensure that all users needs are catered for, without the need to spend on functionality that isn’t required by all users
* **Optional Integration with Microsoft Teams** at a SIP level, retaining the native Microsoft Teams user experience and without the need for any ‘bots’ or 3rd party softphones. Must support native Teams calling across Desktop, Web and Mobile
* **Simplicity in both deployment and ongoing support** to ease the burden on local IT teams

## **8. Proposal Format Instructions**

The best RFP responses specifically address Xxxxxxxxx Group ’s particular requirements and demonstrate a fit between those requirements and the solution’s strengths. It is best to limit your responses to explanations of your architecture specific to this RFP, highlights of your strengths in areas that we feel are important, and explanations for any non-compliance.

Vendors should respond in the Word document provided. Responses should be stated in the body of the document following the specific questions.

# **Section 1 – Executive Overview**

The Vendor should include with their response an introduction to, and summary of, the RFP response and its specific fit for Xxxxxxxxx Group . Anyone reading only this section should have a clear understanding of the bidder’s proposal and why the solution best fits Xxxxxxxxx Group ’s specific requirements.

# **Section 2 – Solution Diagram**

Provide a diagram that depicts the proposed UCaaS solution.

# **Section 3 – Bidder Profile and Capabilities**

Complete the following table:

|  |  |  |
| --- | --- | --- |
| Corporate Profile: |  |  |
| Corporate  |  |  |
| Corporate HQ Address |  |  |
| Telephone Number |  |  |
| Internet URL |  |  |
| Doing Business Since |  |  |
| Contact Information: |  |  |
| **Account Representative:** |  |  |
| email Address |  |  |
| Telephone Number |  |  |
| **Sales Engineer:** |  |  |
| email Address |  |  |
| Telephone Number |  |  |
| **Sales Manager:** |  |  |
| email Address |  |  |
| Telephone Number |  |  |
| **Address where hosted equipment will be positioned** |  |  |
| **Location of geo-redundant sites** |  |  |

## **3.1 Vendor Background**

Provide a brief overview and history.

## **3.2 Financial Stability**

Vendor must describe their financial stability.

## **3.3 Research and Development**

Bidder should describe its commitment to ongoing research and development defining those areas that support the strategic direction of the proposed solution.

Please clearly outline which elements of your technology portfolio you own directly and which areas you utilise partnerships and/or 3rd party products.

## **3.4 Industry Awards and Recognition**

Bidder must indicate any Industry Awards and/or Recognition received.

## **3.5 Competitive Advantages**

Please summarise the key differentiators of your services. What do you believe distinguishes your company from the other Service Providers being considered by Xxxxxxxxx Group ? Please include the key benefits Xxxxxxxxx Group will receive by becoming a partner or client of your organisation.

## **3.6 Xxxxxxxxxx Group Base and Case Studies**

Describe your Xxxxxxxxxx Group base and provide any case studies that are relevant to Xxxxxxxxx Group ’s proposed solution.

# **Section 4 – Contact Centre as a Service (CCaaS)**

Not relevant

# **Section 5 – Unified Communications as a Service (UCaaS)**

## **5.1 UCaaS Overview**

Xxxxxxxxxx Group input on knowledge and experience with UCaaS solutions.

## **5.2 Voice Services Background & General Environment**

**Current Voice Services Description**

## **5.3 Challenges with current System**

Xxxxxxxxx Group input

Example: The primary concerns with the current voice communications platform consist of the following:

1. Multiple communication tools from multiple vendors does not facilitate ease of use and adoption.
2. The platform lacks redundancy elements at each location leaving the company vulnerable to any sort local outage incident
3. Call dropping; Call dead space or cutout
4. Expandability of messaging system

## **5.4 IT Infrastructure and IT Architecture**

5.4.1 Xxxxxxxxx Group input: description of current IT Infrastructure and Architecture. Diagrams of current IT Infrastructure and Architecture

5.4.2 Diagrams of current IT Infrastructure and Architecture

## **5.5 Desktop and Application Standards**

5.5.1 Xxxxxxxxx Group description of desktop and application standards required and or requested.

5.5.2 Diagrams or lists of current IT Infrastructure and Architecture desktop and application standards

## **5.6 VoIP Compatible Network**

It is understood that the network infrastructures will meet best practices and standards for a VoIP deployment. The vendor can make the following assumptions in order to configure their proposed solution (Xxxxxxxxx Group input):

## **5.7 VoIP Readiness**

Please describe your network process, procedures to assure our network meets the VoIP readiness requirements of your proposed solution. If there are additional costs associated with third party products, software, hardware and or services please specify these additional costs and note in the pricing section of your response.

## **5.8 Telephony requirements**

Conceptual of expected architecture: Xxxxxxxxx Group input

## **5.9 General Requirements**

**Xxxxxxxxx Group input: A communications platform that ensures business continuity by having a robust and highly resilient solution designed to provide seamless and uninterrupted service.**

**It should be possible to ‘mix and match’ licenses based on the individual requirements of each type of user for example basic telephony user, Microsoft Teams user, shared/common phone, power/mobile user receptionist, administrator.**

**The platform should provide full integration with Microsoft Teams, even if this is not rolled out day one. This integration should be at a SIP level, retaining the native Microsoft Teams user experience, without using any ‘bots’ or 3rd party softphones and should support MS Teams Desktop, Web and Mobile.**

**There should be the ability to ‘mix and match’ MS Teams and non-Teams endpoints in the solution, with all endpoints on the same common platform, with a single point of administration.**

**The primary data centres for the proposed solution should be in the UK.**

**All user licenses should include Unlimited Outbound Calling minutes (to UK Landline and Mobile numbers as a minimum).**

## **5.10 Redundancy**

5.10.1 **Core Cloud Resiliency**: Hot standby failover to a synchronised secondary processor, preferably positioned in geographically diverse locations.

5.10.2 **Global Service Continuity:** What are the locations of points of presence in the UK and around the world? How does your platform ensure connectivity in the event that a point of presence is unavailable or unreachable?

5.10.3 Carrier Resiliency

5.10.3.1 Multiple carrier links configured with automatic failover mechanisms in order to preserve inbound ANI/DNIS information.

5.10.3.2 Provide a brief description and discussion of the recommended system architecture.

## **5.11 Security**

5.11.1 Describe how historical reports are generated. Is your system HIPAA compliant?

5.11.2 Is your service ISO27001 and ISO9001 compliant?

5.11.3 Are you Cyber Essentials compliant?

5.11.4 Is your service PCI-DSS compliant?

5.11.5 Do you offer voice encryption?

5.11.6 Do you offer encryption of recorded calls?

5.11.7 Do you support Single Sign-on integration with third party identity providers?

5.11.8 Describe your security process and other certifications and capabilities you may have.

## **5.12 Compliance with Emergency Services Calling**

The proposed solution should be Emergency Services Calling compatible, which we define as the following:

* Route calls to the Public Service Answering Point with the correct physical address for that station
* Allow a 999 call to be made from any station, even if that station is restricted to extension dialing only

## **5.13 Telephone Specifications**

5.13.1Your recommended IP desk phones should include, a minimum two-line appearances, HD call quality (or equivalent), duplex speakerphone, hold key (dedicated), transfer key (dedicated) snd a spare gig port for connectivity to a computer.

5.13.2Please describe your systems capabilities to work with any industry standard SIP IP phone or device. Please provide the minimum SIP specifications.

5.13.3Executive assistants/receptionists require visibility to their executive’s line appearance(s) and ability to answer those calls.

5.13.4The ability to utilise non-desk phones as a telephony endpoint in a seamless manner. This should minimally include: Smartphones (Android, iPhone), Desktops (Windows, MAC), Tablet (Windows, iOS, Android).

5.13.5 **Music on Hold**: Xxxxxxxxx Group expects the ability to present different music options.

5.13.6 **Message on Hold**: Xxxxxxxxx Group expects the ability to present intermittent informative messages to the callers while waiting on hold.

5.13.7 **Fax Service**: Xxxxxxxxx Group will require Fax Service element as part of the proposed solution. Please describe the fax service functionality proposed.

## **5.14 System Administration Requirements**

Xxxxxxxxx Group requires a system administration tool capable of supporting all offices within the enterprise from a single intuitive user interface. Ideally, this program will allow management of the phone system, voicemail, etc. from a single unified interface. Please describe all functions and applications the administration tools can support and include screenshots for each application.

## **5.15 Optional Desired Future Applications**

The following features are not an immediate requirement however Xxxxxxxxx Group may have a future interest in implementing if available.

Xxxxxxxxx Group to list items here.

## **5.16 Call Recording Questions**

5.16.1Does your platform provide the ability to support the following recording settings?

5.16.2For each user with recording, the ability to “record all” and “record on demand”.

5.16.3Retain recordings for at least 90 days

## **5.17 Messaging & Front-End Platform**

Please describe your messaging platform.

## **5.18 Auto Attendant Requirements**

5.18.1Automated Attendant – Incoming calls to Xxxxxxxxx Group are answered by an Automated Attendant that directs calls to the appropriate departments, or individual extensions.

5.18.2The Auto Attendant should provide unique treatment based on time of day, day of week and holidays.

5.18.3Xxxxxxxxx Group would also like to setup a backup Auto Attendant service which could be introduced as a front-end in the event of a natural disaster or emergency situation.

5.18.4 The system should allow system administrators to easily update menu options and related announcements.

## **5.19 Voice Mail Requirements**

It is imperative that any new voicemail platform be easy to use and easy to change greetings. Describe your solution.

## **5.20 Unified Communications**

Many vendors commonly group together applications that empower onsite and remote workers through what is now commonly referred to as Unified Communications. This umbrella term may include Unified Messaging, Find Me/Follow Me, Instant Messaging, Presence, Text to Speech access to emails, Speech Recognition access to system features, Computer Telephone Integration, etc.).

## **5.21 Unified Messaging**

Please provide a general description of your Unified Messaging offering

## **5.22 Unified Communications and Collaboration**

5.22.1Describe any Unified Communications functionality available with the proposed solution.

5.22.2Please describe your integration capabilities with Microsoft Teams. Describe how your solutions integrates with Microsoft Teams to retain the native Microsoft user experience across Desktop, Web and Mobile without the need for any ‘bots’ or 3rd party applications.

5.22.3Please confirm that both Microsoft Teams and non-Teams users can be administered centrally through a single administration portal and will be on the same logical platform.

5.22.4Please confirm that user licenses can be ‘mixed and matched’ to support the various users profiles across our organisation.

## **5.23 Mobility Applications**

Describe any mobility features and mobile applications included in the proposed solution.

5.23.1If the call answered on the desk phone, how do you extend the call to the cell phone?

5.23.2Can your mobile application seamlessly move between WIFI and cellular data (3G/4G or greater). Please describe.

## **5.24 Business Application Integration**

Describe any additional integration capabilities for the proposed solution.

## **5.25 Business Intelligence and Telephony Analytics**

5.25.1 Is your system capable of aggregating call volume summaries across individual locations?

5.25.2Are summaries of inbound and outbound calls available by department, workgroup, etc.?

5.25.3Do you provide reporting on endpoint connectivity status?

5.25.4Do you provide reporting on call quality?

## **5.26 Call Detail Reporting**

Describe the call detail reports that are available from the administration interface.

Are the call detail reports able to be scheduled to run automatically?

## **5.27 General Questions**

5.27.1Usage: Is outbound calling usage included in your solution and if so, please describe how many minutes are included for each license type along with locations/types of numbers included.

## **5.28 Telephone Specifications**

5.28.1Provide a description for each physical telephone being proposed.

5.28.2Provide a screenshot and brief description for the PC softphone or client software.

## **5.29 VoIP Specifications**

5.29.1Which CODECs are supported natively by the telephones and in order to support Fax over IP?

5.29.2 Is there an additional charge for requesting more than one CODEC (G.711 + G.729) with the platform proposed?

## **5.30 System Admin & Diagnostic Questions**

5.30.1Describe the process for making any Moves, Adds and Changes.

5.30.2What diagnostic tools, logs and reports are available to aid in isolating faults?

5.30.3Does the proposed system have the ability to monitor VoIP Quality of Service?

# **Section 6 – Implementation Expectations**

## **6.1 Installation**

Please describe your implementation and deployment process and include a sample project plan with your response. Describe how you can ensure the deployment process is made as low risk as possible, with the minimal amount of reliance on Xxxxxxxxx Group IT team.

## **6.2 Training**

The successful Vendor is expected to include training. Please describe your proposed training services. Describe any self-service built-in help menus that might be used to offset training requirements.

# **Section 7 – Warranty, Maintenance, and Xxxxxxxxxx Group Support**

## **7.1 Support Questions**

Describe Vendor’s proposed service and support.

7.1.1 If Manufacturer will be providing any maintenance and/or warranty coverage, then describe how Xxxxxxxxx Group would open tickets, receive service, obtain replacement parts, and receive onsite support through the manufacturer.

7.1.2 Please describe maintenance and software assurance after initial purchase requirements to maintain system and upgrades.

7.1.3 Please describe what additional services you can offer to lessen the time required to make changes to the system by Xxxxxxxxx Group IT team. For example, can you provide a service to carry out Moves, Adds and Changes on our behalf.

7.1.4 Please describe the size and scale of your team based in the UK who would be available to support Xxxxxxxxx Group in terms of ongoing Account Management, Support, Deployment and any other relevant functions,

# **Section 8 – Contract Terms and Conditions**

## **8.1 General Conditions**

The vendor shall provide a copy of their general terms and conditions.

# **Section 9 - Pricing**

The vendor shall provide a detailed Quote for the proposed solution. You may also outline the projected cost savings that you would expect Xxxxxxxxx Group to realise by adopting your solution, over 3 and 5 year terms.