



CCAAS RFP TEMPLATE

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Below you'll find a great CCaaS RFP template we often use with our clients. It can be exhausting trying to find the right questions to add to an RFP—luckily, we did the work for you, enjoy!

CCAAS RFP TEMPLATE

Overview

<Insert a business overview here. Be sure to explain your market position and how you interface with your customers today.>

Headquartered in xxx, CLIENTX (market:symbol) is a new breed of xxx supply company—one that delivers a unique combination of high growth, diversification and high profitability. We are enabling a better-connected and safer world by delivering breakthrough xx products for xxxxxx.

Today, CLIENTX is the global leader in designing and producing xxxxx. Our products help shape the way that people around the world interface with technology applications. We are focused on the vertical marketing including yyyy and zzzz.

CLIENTX interfaces with our clients via business to business and business to consumer marketing channels in geographies including xx, yy, zz. We expect to grow through the continuous acquisition of smaller companies that fit seamlessly into our portfolio and will target growth markets around the world.

Contact Center– Current State

CLIENTX has two primary contact centers located in A_state, City and B_Country, City. Both of the primary contact centers have legacy xxx PBX technology in place and leverage SIP trunking over redundant internet connections.

Staffing

- 100 full-time agents at each location
- 4 Supervisors at each location
- Seasonal: additional 25 agents at each center from Nov 1 to Feb 1

Telephony

- 200 DIDs at each site
- 17 Toll Free Numbers (including 8 ITFN and 2 UIFN)
- Monthly Average Minutes of Use Toll Free:
- Monthly Average Minutes of Use Interstate:
- Fax: 10 at each site
- XXX PBX headsets and handsets at each seat

Wide Area Network

- Dual 1Gbps Dedicated Internet Access at each site
- Diverse Local Access to Diverse carrier PoPs
- High Availability SDWAN with SASE

Contact Center Overview

- Software: xxx PBX Contact Center Client
- Call Recording: tagged with client DID identifiers
- Call Queues: 4 call queues
- Outbound sales: 25 of 200 agents
- CRM: Salesforce
- Wallboards: Display calls waiting, total calls answered, longest time call waiting, and average wait time for the day

Contact Center Stats

Total calls FY2021: xx

Average Daily Calls: xx

Average Monthly Calls: xx

Average Speed of Answer: xx

Average Handling Time: xx

Total Emails FY 2021: xx

Average Monthly Emails: xx

CLIENTX CCaaS RFP Objectives

CLIENTX is seeking a Contact Center as a Service supplier that will facilitate the global growth of CLIENTX by proving a platform that offers the latest in native contact center capabilities and a roadmap that demonstrates a complete investment in the customer experience as well as on workforce performance.

CCaaS RFP respondents should focus on their core competencies and propose a complete solution that is fully supportable.

The RFP also includes a section (Addenda) for respondents to provide additional detail that may be of interest to CLIENTX, including screen shots. CLIENTX would like to understand how the respondents can provide additional value with competitive services that augment the proposed CCaaS solution.

Key considerations include:

- Automatic Call Distribution (ACD)
- Interactive Voice Response (IVR)
- Omnichannel Capabilities
- Performance Management
- Workforce Optimization
- Gamification
- Quality Management
- CRM/Ticketing (Native vs Integrated)
- Compliance
- Professional Services
- Technical Account Management (TAM)
- Simplified Cost Structure
- Scalability of Platform

1. Background & Instructions

You are one of several suppliers invited to participate in the CLIENTX selection process for its Contact Center services. We will provide a description of the required products and services in the subsequent sections of this RFP, and provide all participating suppliers with an opportunity to ask questions of the project team for any elements that need clarification. Please review all sections herein, and respond to all questions in a complete and concise manner. We appreciate your participation in this RFP, and look forward to reviewing your response.

1.1 Confidentiality Provisions:

The terms of this RFP, and all related information provided by CLIENTX in connection with this RFP, are to be treated by Supplier as strictly confidential and proprietary to CLIENTX. Such materials are to be used solely by Supplier for the purpose of responding to this RFP. Access to this RFP, and all related information provided by CLIENTX in connection with this RFP, shall not be granted by Supplier to third parties except upon prior written consent of CLIENTX and upon written agreement of the intended recipient to treat the same as confidential. CLIENTX may request at any time that any of its material be returned or destroyed, and Supplier agrees to comply with such request. Should you decide not to respond to this RFP, you must destroy this RFP and all such information and duplicates thereof. In the event that Supplier and CLIENTX have entered into a non-disclosure agreement, the terms of the non-disclosure agreement shall take precedence and control over the terms of this Section. The existence and provisions of this RFP will be considered to be CLIENTX's confidential information under the non-disclosure agreement.

1.2 Coverage and Participation:

The intended coverage of this RFP, and any agreement resulting from this solicitation, shall be for the use of the requesting CLIENTX. The CLIENTX reserves the right to add and/or delete elements, or to change any element of the coverage and participation at any time without prior notification and without any liability or obligation of any kind or amount. Upon receipt of this RFP, Supplier shall have previously submitted a signed copy of a Confidentiality Agreement (CA) or Non-Disclosure Agreement (NDA) with CLIENTX. The CA or NDA shall be applicable to this RFP, your response, and all future dealings between Provider and CLIENTX until CA or NDA termination or expiration.

1.3 Proposal Costs:

Supplier is responsible for all costs associated with preparation of your proposal, and submission of a proposal in no way obligates CLIENTX to you in any manner. In addition, such costs may not be charged back to CLIENTX if a mutually agreed to definitive agreement is entered into with CLIENTX. Supplier Obligations and Responsibilities:

The act of submitting a response to this RFP indicates Supplier's agreement that it will be held accountable for understanding and/or providing the following:

1. The conditions under which the services provided by the Supplier will meet CLIENTX's requirements, including those outlined within this document,
2. The conditions that satisfy the contents of this RFP and all other contracts and documents applicable to the services offered in your response, and
3. The conditions that satisfy all prevailing laws, ordinances, provisions, rates and labor conditions.

Any failure, error or omission by Supplier will not relieve Provider from the obligation to successfully execute and deliver the terms therein.

1.4 Modifications or Withdrawals:

Prior to the time and date specified as the RFP deadline, responses to this RFP may be modified or withdrawn. Withdrawn proposals may be re submitted up to the time and date specified as the RFP submission deadline, provided that the response is consistent with the instructions in this RFP. Any modification to a proposal submitted after such deadline may result in the disqualification of the proposal in CLIENTX's sole discretion.

1.5 Right to Select:

CLIENTX reserves the right to select and negotiate with those Suppliers it judges as having submitted a competitive proposal and to terminate negotiations at any time without incurring any liability to any Supplier. No Obligation: CLIENTX is under no obligation to procure or contract for the services described in this RFP or Supplier's response to this RFP. CLIENTX also reserves the right to select one or more preferred Suppliers to best support its business units. You waive any right to claim damages of any nature whatsoever based on the selection process, final selection, and any communications associated with the selection.

1.6 Final Agreement:

It is expected that any or all contents of a Supplier's proposal may be eligible for inclusion into a final definitive written agreement.

1.7 Event Time line

Remittance of Signed Non-Disclosure Agreement	Prior to Bid Receipt
RFP open for suppliers' review and responses	June 1st
Deadline to submit questions	June 6th
CLIENTX's response to submitted questions	June 8th
Proposal submission deadline	June 29th
Evaluation of participant proposals	Week of July 9th
Meetings with finalists	Week of July 16th
Conditional award notification	TBD
Negotiations and finalization of contract terms	TBD

1.8 Good Faith Statement:

All information provided by CLIENTX in this RFP is offered in good faith. Individual items are subject to change at any time. CLIENTX makes no certification that any item in this RFP is without error. CLIENTX is not responsible or liable for any use of the information or for any claims asserted there from. Note - All RFP communications between CLIENTX and Supplier solicited by or for clarification of this RFP are considered confidential and shall not be distributed outside of these entities.

1.9 Intention to Bid:

Suppliers must notify CLIENTX of their intention to bid or decision not to bid by June 5th, 20ZZ. Notification should be in writing via email. Supplier's response should be forwarded to the following RFP contacts:

- | | | |
|--|--|--------------|
| 1. Scott Bryan, President MacroNet LLC | scott@macronetllc.com | 603-758-3075 |
| 2. Xxx xxx, IT Infrastructure Services x | xx.xxxx@ClientX.com | 555-555-5555 |

1.10 Supplier Presentations:

Suppliers submitting a valid bid meeting the requirements outlined in this RFP may be asked to make a presentation to the Infrastructure Services Evaluation Team. The presentation will take place in our Headquarters location and Supplier will be expected to provide phone and web conferencing services so that CLIENTX's associates from other locations can participate. If asked to make a presentation, a representative from CLIENTX will contact you to schedule your presentation time after an Intent to Bid has been received. CLIENTX has no obligation to grant the right to make a presentation to Supplier. We may also opt to schedule onsite visits to your business location and data center at this time.

1.11 Evaluation Criteria:

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, completeness, format, and organization. The purpose of this RFP is to identify those suppliers that have the interest, capability, and financial strength to provide CLIENTX with the required Telecom Services as outlined in solicitation for such services. A systematic evaluation and scoring of RFP responses will be conducted which will include the following evaluation criteria, subject to change at CLIENTX's discretion:

1. Cultural fit between companies;
2. Governance to ensure high levels of quality and control;
3. Capability of Supplier to meet or exceed requirements set forth in RFP;
4. Strength of defined WAN services framework including Network Services and Network Security;
5. Financial stability of Supplier and strength of business;
6. Demonstrated long term partnerships with clients similar to CLIENTX;
7. Competitive pricing and cost effectiveness of Supplier's solution;
8. Ability and skills of technical support staff and account team structure;
9. Strength of testimonials from supplier references;
10. Implementation Management capabilities and strength;
11. Overall Rating.

1.12 Method of Evaluation:

Suppliers determined by CLIENTX to possess the capacity to compete for the Telecom Services, will be selected to move into the negotiation phase of this process. Written notification will be sent to these providers via email. Those Providers who were not selected for the negotiation phase will also be notified via email.

1.13 Contract Duration:

CLIENTX may consider contracts of approximately three (3) years in length, subject to early termination based upon certain events. The actual term of any final contract will be mutually determined by CLIENTX and the successful Supplier. CLIENTX expects that any contract extension will be based on continuous improvement of supplier performance in quality, service, and cost.

1.14 Pricing:

All Suppliers must provide pricing information for the areas of services outlined in this RFP for which they will be able to provide services. The Supplier must agree to keep these prices valid for 120 days from the due date of the RFP response.

1.15 Questions:

Questions will be answered as quickly as possible. All questions should be directed to:

- | | | |
|--|--|--------------|
| 1. Scott Bryan, President MacroNet LLC | scott@macronetllc.com | 603-758-3075 |
| 2. Xxx xxx, IT Infrastructure Services x | xx.xxxx@ClientX.com | 555-555-5555 |

2. Company Information

This section is to provide general company and contact information.

Bidding Company Name:	
Address:	
Tax ID Number:	
Sales Representative Name:	
Telephone Number:	
E-mail address:	
Technical Advisor:	
Telephone Number:	
E-mail address:	

2.1 Executive Summary

Briefly describe the key elements of your proposal. Highlight any major features, functions, or areas of support that differentiate your service offering from your competitors' offerings. Please give a brief overview of your Company.

2.2 Supplier's Company Background

Provide a brief overview and history of your company. Provide a brief overview of your global network capabilities and insert global network maps.

2.3 Financial Information

Provide financial information on your company and companies for which you are reselling services as part of the CLIENTX solution (e.g., annual report); direct links to public financial information will suffice. If you are not a publicly traded company, provide us with a profile of your revenue growth since inception, profit or loss over this period, capital expenditures, SG&A expenses, etc., as can be shared. Please state your financial backing, such as venture capital, business partners, etc. We are seeking information that will give confidence that your organization is financially viable over the long-term. Please confirm you are not undergoing any restructuring. Do you foresee any acquisition, merge or divestiture in your organization within the next year?

3. PROPOSED SOLUTION SUMMARY

3.1 Provide a detailed overview of the solution that your team is proposing to CLIENTX. Include a summary of how your solution meets CLIENTX's requirements. Describe all of the Services included in the solution. Additionally, respondents are encouraged to summarize a pricing structure that will outline how CLIENTX can exceed the capabilities of their current environment on Day 1 and can add on transformational capabilities as the business case permits over the course of the term. This roadmap, including the associated MRC and NRC costs will be enable the leadership to clearly communicate the future functionality and associated costs. The full pricing sheet can be attached as an addendum.

4. BASIC FEATURE REQUIREMENTS

Answer content should address the below queries:

- Explain in detail your Interactive Voice Response capabilities including the ability to manage custom flow designs.
- Explain inbound and outbound dialing features including any predictive dialing, power dialing, and agentless dialing capabilities.
- Provide an overview of how your platform enables remote agents on a global scale.
- Explain where language and translation tools help support global contact centers to expand.
- Describe call recording capabilities, QA for call recordings, where recordings are stored, duration of storage, and fee structure for call recording and storage.
- Describe the live monitoring capabilities of your platform.
- Summarize the platform's use of Artificial Intelligence, Natural Language Processing, and Machine Learning.
- Describe in detail the post-call survey capabilities of the platform including basic and enhanced features. Where is the data stored (in CRM?), how can triggers be set and managed for interactions below threshold?
- Describe how your platform can solve for next generation Faxing solutions.

5. INTEGRATIONS

Answer content should address the below queries:

- Describe "Single-Sign-On" support for reps through <CLIENTX_CRM> and other business applications.
- Describe how your platform completes the integration with <CLIENTX_CRM> using screen pops.
- Describe how the CTI is displayed on the screen (pinned or floating) and is it customizable.
- Describe how Supplier offers auto-call logging with <CLIENTX_CRM>.
- Can your platform speak to custom objects and custom fields within the <CLIENTX_CRM> system?
- Can calls be routed based on CRM data? If yes, is this native to your platform? Will custom development be required? Please explain.
- Describe any pre-built automations you have with our CRM.
- Can you support look up and identify by account/contact/lead phone number ("Caller ID") from the CRM? Can you highlight if it is a VIP customer, name, and account when they call?
- Describe "Single-Sign-On" support for reps through <CLIENTX_CRM> and other business applications.
- Explain your teams capabilities to support custom integrations.
- Provide a link to or list the negotiated integrations that your platform has implemented and ready for use including WFM, Collaboration tools, and other common contact center business applications.
- Explain the work effort required to implement your listed integrations.

6. OMNICHANNEL

Answer content should address the below queries:

- Describe the agent desktop support of interactions across channels including email, social, chat, text, and messaging. Provide your omnichannel differentiators in this answer.
- Describe how the system can log interactions across digital channels into CRMs or other business systems.
- Can interactions elevate between channels as necessary? Explain.
- Explain how queue priority can be managed using predefined rules.
- Can messages across all channels be automatically escalated if not addressed within timing thresholds?
- Describe how templates can be used across channels to support representatives and highlight any use of AI in the Omnichannel on your platform.
- Does the platform provide summary analytics data for rapid view of trends and performance across channels?
- 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 a call begins?

7. SELF SERVICE

Answer content should address the below queries:

- How does the platform enable self service across all touchpoints in the customer journey?
- Do you have AI capabilities to enable self service such as an Agent Virtual Assist solution?
- Does customer generated data from self service interactions flow to live agents if necessary?
- Provide your input on how self service can provide value to CLIENTX and the customers of CLIENTX.

8. KNOWLEDGE MANAGEMENT

Answer content should address the below queries:

- Summarize the knowledge management offering and how it offers continuous improvement.
- Is the offering native to the platform and does it seamlessly integrate with other contact center tools including virtual assistants and agents?
- Explain how the offering leverages natural language processing (NLP) to quickly help agent and customers to access relevant knowledge.

- How does the offering update articles and how is the content continuously updated and optimized?
- Does the platform clearly delineate internal and external content?

9. WORK FORCE MANAGEMENT/WORK FORCE OPTIMIZATION

Answer content should address the below queries:

- Does your platform offer a native WFO/WFM function?
- Describe the capabilities to schedule and forecast on an hourly basis (by day of week) the call volume trends and staffing requirements.
- Describe how agents and supervisors can request, approve, collaborate on scheduling needs.
- 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.
- Do you offer a portal where agents and supervisors can request, approve, collaborate on scheduling needs?
- Does the platform offer real-time agent status and schedule adherence monitoring? Does this integrate with Slack or any applications for notifications?
- Describe all Gamification capabilities that are native to the platform and existing integrations for implementing and optimizing gamification.
- Highlight any gamification use cases pertinent to ClientX (including links or attach as addenda)

10. REPORTING AND ANALYTICS

Answer content should address the below queries:

- Describe basic and advanced reporting capabilities of the platform. Highlight real-time reporting and analytics tools and the ability to integrate real-time metrics into other business tools (i.e. BI tools)
- Describe in detail any native KPI dashboards and tools for agents, managers and supervisors
- Describe the speech analytics capabilities of the platform including real-time, call recording, and transcripts.
- Explain how your platform supports scoring of and feedback for monitoring and analysis activities.
- What type(s) of screen recording capabilities are offered by the platform?

11. SECURITY AND COMPLIANCE

Answer content should address the below queries:

- Describe the system architecture.
- Provide Security Policy documentation to include disaster recovery, InfoSec policy, incident management, notifications, etc.
- Summarize third-party vulnerability scans and penetration test results from within the last 12 months.
- List your platform compliance including SOC I Type II, SOC II Type II, other.
- Please list all certification and regulatory compliance supported by your organization.
- Describe the security and data integrity features of the system.
- GDPR – Explain how your platform helps clients meet requirements for GDPR compliance.
- HIPAA – Is your platform HIPAA compliant and can you provide a BAA upon request?
- PCI – Is your platform PCI compliant and how does it support PCI requirements?
- Explain how your platform will help ensure that ClientX meets Telephone Consumer Protection Act (TCPA) requirements.

12. SERVICE PORTAL CAPABILITIES

Answer content should address the below queries:

- Provide a detailed overview of each portal that CLIENTX will interface with to manage and monitor the solution that you are proposing. Explain in detail the level of control that the client will have of the services that you are proposing
- List out all pertinent account management functionality available via the portal(s).

13. SLA's and TROUBLE MANAGEMENT

Answer content should address the below queries:

- Include your standard Service Level Agreements in this section, and be specific per type of offering and technology what your service levels are for each of the solutions you propose to us. Include your Key Performance Indicators and their method of calculation.
- What are your procedures for trouble reporting and escalation, including the trouble ticketing methodology? Insert your trouble handling priority matrix.
- Insert an escalation list, including hierarchy up to executive levels along with their contact information.
- Are your trouble tickets and escalation contacts viewable to us real-time through a single customer web portal?

14. BILLING

Answer content should address the below queries:

- 6.1 Summarize current billing services offered and indicate planned enhancements. Describe your flexibility in accommodating various billing cycles/requirements. Client requires monthly by means of a single bill for all services, and each billing cycle should give Client the opportunity to review and agree billing details prior to giving approval for a vendor bill to be issued.
- 6.2 Do you provide a hierarchy structure for flexibility in organizing the information presented on the invoice? If so, please describe the levels in your billing hierarchy.
- 6.3 Can we provide our own account codes and Client site names for organizing the billing hierarchy and sorting?
- 6.4 Describe the media options offered for invoice information and please provide a sample Bill that exemplifies the proposed services.
- 6.5 Describe your billing reporting capabilities

15. ACCOUNT SUPPORT & SALES INFORMATION

- 9.1 Please describe how the customer will be supported after the implementation of the platform specific to inquiries for training on the management of and changes to features and functions of the platform that have been implemented for ClientX.
- 9.2 Please describe the different roles of the account team assigned to our account. Please include the names of specific individuals and their credentials that will be assigned to our account. CLIENTX values an account team that is fully versed in the unique nature of our business and expects dedicated account support.
- 9.3 Frequent and candid communication is vital to maintaining a good working relationship between our company and our provider of communication services. Explain how the team assigned to our account would maintain communication with our team with respect to new installations, upgrades, network problems, billing issues, changes to the services, and new products and services?
- What assurance can you give us that this communication will be proactive, relevant and forthright? Describe how empowered the account team is in support of our account? For instance, can the account team circumvent normal operating procedure to serve as our advocate to address an important service request?

16. PROJECT MANAGEMENT

Answer content should address the below queries:

- Describe your Project Management organization.
- Describe how your company will support the implementation of the proposed network.

- Explain in detail what you propose for a Proof of Concept relative to the CLIENTX solution.
- Summarize how your company will support the cutover process specifically.
- Insert an organizational chart of the team that will support the implementation of the proposed network.

17. FIELD OPERATIONS AND PROFESSIONAL SERVICES

Answer content should address the below queries:

- Define the capabilities of your Field Services organization
- Provide an overview of the scope of capability of your Professional Services organization
 - Describe in detail the ability to provide on-site technical resources to implement network services in the US and on a global scale.

18. VALUE ADDED SERVICES & INNOVATION

Briefly describe other services that may augment the proposed CCaaS solution. Include realistic product roadmap highlights and how they might add value for CLIENTX.

19. COST BENEFIT ANALYSIS

Briefly describe how your technology, processes, and professional services support a valid TCO/ROI business case. Note typical areas of inefficiency and how your platform will help to minimize or eliminate inefficiencies and costs across the business of CLIENTX. Any additional case detail or TCO/ROI tools may be attached as Addenda.

20. REFERENCES

Provide contact information for a minimum of two references that are similar in size to CLIENTX. CLIENTX will not contact the references below without providing the Sales representative 48 hour prior notice. If you prefer to coordinate the calls please advise.

21. PROOF OF CONCEPT

Outline how your team proposes to validate your technology via a proof of concept in this section. Please be specific as to how the POC will be implemented and any commitments that are proposed for the POC phase..

22. PROPOSAL SUMMARY – TERMS AND CONDITIONS

Terms and Conditions – The vendor shall include a copy of standard terms and conditions as part of the submittal package. Include all applicable Service Exhibits.

Pricing

Attach pricing for the solution with the response. Clearly delineate pricing that is a part of the solution on Day 1 and which items are potential roadmap additions. Non-recurring pricing should be clearly defined.

Addenda

Attach any addenda necessary to complete the RFP responses in logical sections. Please clearly describe the intent and content of each addendum in the title. Feel free to include screen shots in this section.