SAMPLE

Contact Center RFP Guide with Foreword

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Foreword

You've begun the process of acquiring new or replacing outdated contact center software.

After conducting a self-assessment, you have a good idea of your technology and business needs. Now you're ready to create a request for proposal (RFP).

An RFP is a standard part of any procurement process. By soliciting bids from multiple providers based on the same set of requirements, companies can compare and contrast solutions. This process is particularly helpful when determining a provider's ability to deliver on your contact center technology needs.

Contact center software solutions can comprise of several components, including interactive voice response (IVR), automatic call distributor (ACD), outbound campaign management and workforce management. Your needs for each of these components can be as varied as the solutions themselves. This RFP template will help ensure that you consider all of the various aspects of contact center technology solutions and the relevant questions for each component. It will also equip you with the questions necessary to understand the implications of moving to a hosted, or cloud-based deployment, as well as the security requirements to consider.

Questions to Ask Your Contact Center Vendor

IVR

IVR technology systems automate the process of customer interaction by enabling customers to serve themselves using a combination of touch tone and speech recognition and voice applications. Today's IVR apps and systems can facilitate simple or very complex customer requests efficiently and cost effectively, without ever requiring a live agent's time. There are many options available with IVRs, but which options are right for you?

1. Does your IVR support both inbound and outbound functionality from the same core IVR application? Or, does it require two unique IVR applications?

2. How does your IVR differ between self-service applications — calls that are entirely contained — and simple routing applications (e.g. Press 1 for …, Press 2 for …)?

3. Which payment collections applications does your IVR integrate into today?

4. How would you integrate with applications that you are not currently integrated with?

5. What are your top three systems that your IVR integrates into for host interactions, i.e. SalesForce, Oracle, SQL database, etc.?

6. Does this include both read and write capabilities?

7. How does your IVR integrate into legacy (non web services) applications, such as AS400 or other "green screen" applications?

8. Please list the languages that you support.

9. What voice formats does your IVR support for prompts?

10. Please describe the process to modify an existing voice prompt.

11. Please describe the process to modify the exit point routing of the IVR to transfer the call off platform.

12. How quickly do real-time changes take effect in the IVR?

13. Does your IVR support press or say (e.g. press or say 1)?

14. Does your IVR support directed speech (e.g. key words)?

15. Does your IVR support natural language (e.g. Please tell me why you're calling…)? If so, what is the language engine — and current version — that is supported?

"The IVR, when done well, is like a great concierge for your organization. It can help to intelligently guide callers to where they need to be, and potentially save a lot of time and money, especially when self-service applications are appropriate."

Questions to Ask Your Contact Center Vendor

AUTOMATIC CALL DISTRIBUTION

Quickly and effectively managing inbound customer requests is a minimum expectation for the modern customer experience. Without this ability, customers will suffer through long hold times and poor customer service. And companies will face decreased service levels, customer churn and lost revenue. ACDs are found in almost every professional contact center operation, but not every ACD is created equal. Do your homework to find the right one for you.

1. How many applications do administrators and/or supervisors need to utilize daily? If more than one, what is the purpose of each?

2. How is application security managed? Please provide a detailed description.

3. Is role-based application and/or platform security possible? If so, please elaborate.

4. What are the maximum values that your ACD platform supports for:
   – Number of agents
   – Number of queues or services
   – Number of in-queue prompts
   – Number of skills across the platform
   – Number of skills per agent

5. Please describe how "skills-based routing" works in your ACD.

6. What other types of call routing do you support?

7. What does your standard agent desktop look like? Please describe and include screen shots.

8. What functionality is available on your standard agent desktop?

9. Please describe the top 3 ways that your standard agent desktop can be configured or customized to support unique client requirements.

10. Does your ACD platform support automation of call outcomes/dispositions based on agent activity or other criteria or do the agents need to select a disposition? Please elaborate.

11. Which other systems does your ACD platform integrate with out-of-the-box (e.g. IVR integration for screen pops)?

12. Is this integration limited to only screen pop data for the agents, or can this integration be used for routing purposes as well?

13. Does your platform support integrated queue-level voicemail? If so, what are the options for voicemail notification?

14. Does your platform support integrated agent-level voicemail? If so, what are the options for voicemail notification?

15. Does your platform support agent direct-dial numbers? If so, please describe.

> "ACDs are the workhorse of the contact center, providing routing efficiency and productivity by using sophisticated rules and logic."

Questions to Ask Your Contact Center Vendor

CUSTOM DESKTOP SOLUTION

In busy contact centers during live interactions, agents should be focused on service, efficiency, issue resolution and converting sales opportunities. But customer interactions occur in many channels and require access to data contained in systems spread across the enterprise. What do your agents need immediate access to in order to keep customers satisfied and productivity at optimal levels?

1. Describe your ability to customize the agent desktop (e.g. custom forms, scripts, data access/integration, logic-based workflows, etc.).

2. What platform or language is your custom agent desktop developed in (e.g. Java/.NET, proprietary, VB, etc.)?

3. What knowledge or tools would someone need to modify the agent desktop once it is developed?

"Provide the right information at the right time for the task at hand. The relevant data to support your process, or your customer situation, may not match the out-of-box application layouts."

Questions to Ask Your Contact Center Vendor

OUTBOUND CAMPAIGN MANAGEMENT

Beyond the basics of designing and launching outbound campaigns, companies need the ability to modify proactive customer outreach without interruptions or down-time (while remaining compliant!). And assessing the performance of these campaigns, with insight into every aspect of communication and customer data, is critical to determining success or failure.

1. Is your platform compliant with TCPA regulations? If so, please provide details.

2. What is the maximum number of phone numbers per account record that can be loaded and dialed from a single list?

3. Does your platform support multi-pass dialing of a single file? If so, please provide details.

4. Does your platform support business rules-based dialing? If so, please describe how this is accomplished.

5. Does your platform support "filter-in-place" and real-time dialing rule changes?

6. Does your platform support Preview, Progressive and Predictive dialing? Please explain each feature and provide use cases for each.

"Simplify the answer to "who are you going to call?""

Questions to Ask Your Contact Center Vendor

AUDIO MONITORING/RECORDING

Monitoring and recording audio from customer interactions has always been a critical component in successful customer experience management. Emerging regulatory mandates levied by the Consumer Financial Protection Bureau and the Department of Health and Human Services, to name a few, have made monitoring and recording of interactions mission-critical applications. How does your contact center capture, archive and retrieve customer interactions?

1. Describe your platform's ability to provide real-time audio monitoring (e.g. coach, barge, etc.).

2. Describe your platform's ability to provide audio recording. Include details about how recordings can be accessed.

3. Describe your platform's support for audio recording rules that can be configured by call queue, agent group or percentage based? Please be specific about available criteria.

4. Are call details stored with the audio recording for later retrieval, including call outcome? If so, please list all data captured and maintained.

5. Can calls be exported? If so, please describe how this is done and in what format the output file is.

6. Are recorded calls encrypted before they are extracted by downstream applications? Please describe your encryption key management process.

> "Stop thinking of call recordings as simply the means for you to listen to how your agents are performancing. Start thinking about recordings as sources of insight to strategic business objectives such as sales effectiveness and customer satisfaction."

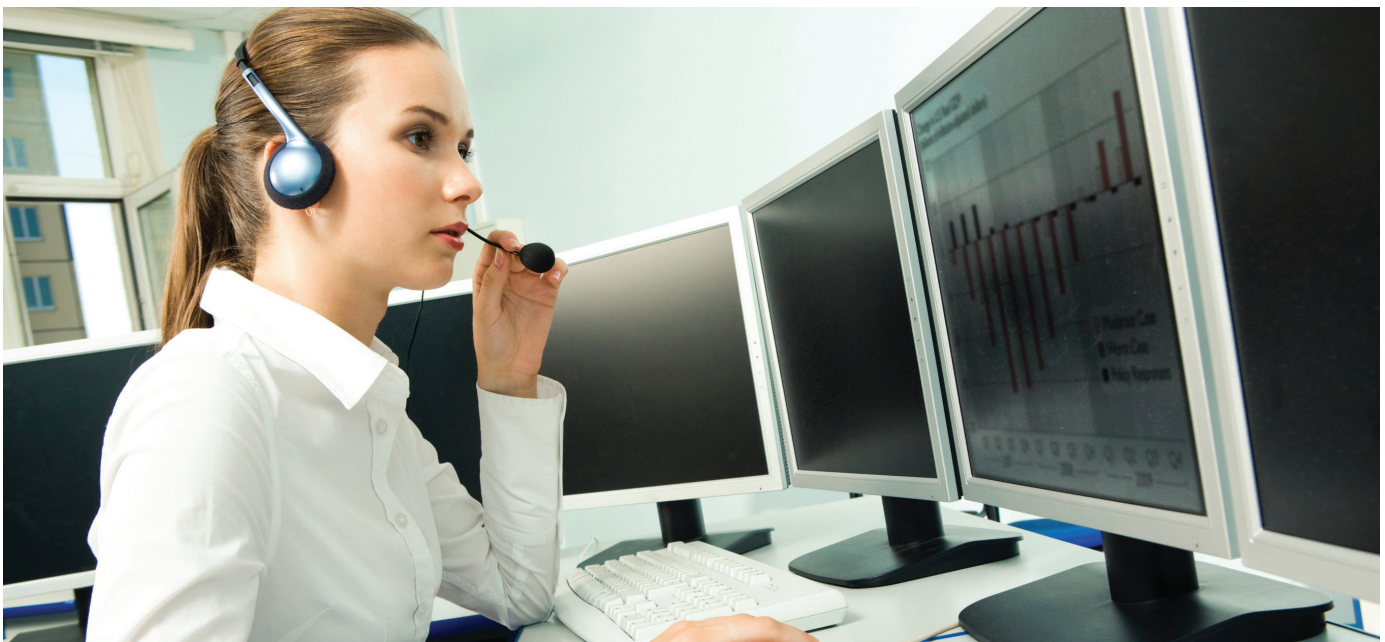# Questions to Ask Your Contact Center Vendor

SCREEN MONITORING/CAPTURE

Capturing a contact center agent's screen activity has become a vital component in assessing performance and service levels. But not every solution offers this capability, so make sure to do your homework!

1. Describe your platform's ability to provide real-time screen monitoring. Include details related to audio synchronization.

2. Does screen capture include the entire agent desktop?

3. Describe your platform's support for screen recording rules that can be configured by call queue, agent group or percentage? Please be specific about available criteria.

4. Is call detail stored with the screen capture for later retrieval, including call outcome? If so, please list all data captured and maintained.

5. Can screen captures be exported? If so, please describe how this is accomplished, along with supported file formats.

"It's not just a window into agent productivity, but an opportunity to identify process inefficiencies. How many applications and screens are agents required to navigate? Capture the evidence of what applications and data is relevant to the processes your agents are required to support."

Questions to Ask Your Contact Center Vendor

AGENT SCORING

Grading agent activity can help identify training opportunities and indicate performance improvements. But if you have different standards, or multiple contact center locations, using agent scoring effectively can be a real challenge. First, identify your specific needs and then determine how scoring can help you improve agent performance.

1. Does your platform include agent score cards? If so, please describe in detail how they are configured and how scores are calculated.

2. Does your scorecard support negative value scores?

3. Does your scorecard support auto-fail responses?

4. Does your system allow for notification and escalation based on scores? If so, please describe in detail.

5. Describe your process for creating and managing agent scorecards.

6. Can agent scorecards be exported and shared with agents?

7. Can the audio — and screen, if available — be played back and paused during agent scoring? Please describe this process.

8. What reports are available that provide visibility to agent performance?

"If you're not scoring performance, how does your agent know what the expectations are? How do you establish consistent and fair measures of performance?"

Excellent
Good
Average
Poor ✔

# Questions to Ask Your Contact Center Vendor

CHAT (External)

While chat has been around for quite some time, it remains an "emerging" channel in the contact center. Not every center will implement chat, but for those that do, an awareness of its unique abilities and limitations are essential before implementing a solution.

1. Describe your platform's ability to provide integrated chat functionality.

2. Can agents handling chats also handle inbound calls? Outbound calls? Email? If so, please describe how this is managed, including best practices.

3. Does your platform provide the ability to support multi-channel reporting?

"Given the trends of preferred communications channels, when will the tipping point evolve into majority of communications being conducted via chat end points?"

Questions to Ask Your Contact Center Vendor
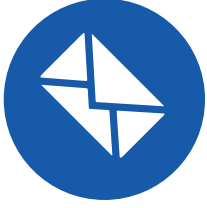
EMAIL (External)

A multi-channel contact center should include email into its mix of customer communications options. But what are your requirements for email routing? Can agents send or receive emails directly to/ from customers? Identify your specific needs so you can implement the ideal solution in your contact center.

1. Describe your platform's ability to route incoming emails to agents for processing.

2. What email server(s) are required or supported?

3. Can agents handling email also handle inbound calls? Outbound calls? Chat? If so, please describe how this is managed, including best practices.

4. Can your platform deliver "contact us" messages from our web page to agents? If so, is the submitted information delivered as an email? Please describe in detail.

"Don't let email be your blindside where you have no insight or tracking of what is being requested and whether all inquiries are receiving appropriate and timely responses. Email solutions support consistent response templates for all your FAQ's and standard inquiries, while also enabling skills-based routing and response tracking."

Questions to Ask Your Contact Center Vendor

SMS

Text is one of the newest emerging channels to enter the contact center, and it's value is becoming evident with improvements in agent productivity and increases in first contact resolution. But while it seems like a simple addition to your contact center solution, there are still some questions you'll need to answer to determine the best SMS solution for your center.

1. Does your platform support outbound SMS (text) messaging functionality? If so, please describe in detail.

2. Does your platform support two-way SMS (text) functionality? If so, please describe in detail.

3. Does your IVR platform support SMS (text) interactions? If so, please describe in detail.

4. Can agents handling SMS also handle inbound calls? Outbound calls? Chat? Email? If so, please describe how this is managed, including best practices.

"How many of your customers don't have a smartphone, mobile device, capable of SMS / text messaging? Typically your customers will check, and respond to messages on their mobile device more than any alternative channel. How can your contact center and your customers benefit from SMS capabilities?"

Questions to Ask Your Contact Center Vendor

WORKFORCE MANAGEMENT (WFM)

Staffing a contact center with the right personnel at the right time is essential to service level attainment. But that task can be daunting without the right tools to help you envision varying scenarios and coordinate staffing plans. Beyond the basics of planning and scheduling, assess your needs for other possible WFM features like integration with other systems, agent access, real-time and historical reporting, and more.

1. Please explain the workforce management capabilities of your platform?

2. Are you providing your own WFM solution, or partnering with a 3rd party vendor? If a vendor, please list the partner and details about the integration with your solution.

3. How does your platform support shift bidding?

4. Do the agents have direct input into the bidding module, or is this managed by the supervisors?

5. How does your platform support shift swapping?

6. How does your platform support time off request wait-listing?

7. Describe in the detail the process for an intra-day change to optimize breaks and lunches based on current call or shrinkage patterns.

8. What intra-day capabilities does your platform have?

9. How do agents access your workforce management platform?

10. How do supervisors and administrators access your workforce management platform?

11. Does your platform support email notifications of shift changes or approved time off?

12. Please describe your platform's workforce utilization analysis and scheduling capabilities.

13. What real-time reporting is available in your platform for workforce management?

14. What historical reporting is available in your platform for workforce management?

15. What are the current ACDs that you are integrated with for both historical and real-time data importing?

16. How does your platform support real-time adherence monitoring and reporting?

17. Does your WFM platform support gamification?

"WFM allows you to get the whole picture of staff scheduling requests vs. real-time adherence. Get creative with what-if scenarios to optimize your staffing levels at all times during all situations."

Questions to Ask Your Contact Center Vendor

Hosted / Cloud-Based Services

Moving your contact center to the cloud can lead to significant cost savings and business agility as long as you know the facts about deployment options, security and redundancy. The right cloud solution will ensure you're always running on the latest software version with the most current and advanced contact center features.

1. Describe your "cloud-based" deployment options and the benefits of each:

• Hosted

• Private cloud

• Public cloud / multi-tenant

• Hybrid

2. Describe the contact center applications that are available from your cloud offering?

3. What are your password management / Single Sign On capabilities?

• Synced password (Same Sign-On)

• Federated authentication (Single Sign-On)

• Separate passwords

4. Do you support Microsoft Active Directory for identity management? If no, describe your identity management process.

5. Describe your platform's ability to scale across tenants.

6. Do you operate geographically redundant data centers?

7. Describe your recovery/ failover model.

8. Describe your connectivity options for agents.

9. Describe your connectivity options for system integration.

10. How would you support on-premises data residency / sovereignty requirements?

11. How would you handle shared / asymmetric encryption?

*"*There are clear advantages to moving to a cloud-based deployment. Moving from a Capex model to an Opex model saves time and money invested in managing and upgrading your contact center infrastructure and applications.*"*

Questions to Ask Your Contact Center Vendor

SECURITY

A mature security program should be committed to protecting customer data and will be one of the most important selection criteria when deciding on a hosted or cloud-based solution. Ensure your vendor can support internal security requirements as well as government-mandated compliance regulations.

1. Is your solution compliant with Payment Card Industry Data Security Standards (PCI-DSS)?

2. Does your company perform regular code reviews, vulnerability scans and penetration tests on application code as part of ongoing security evaluations?

3. Does your company have a scheduled and priority-driven patch application/management process?

4. Do you have a threat assessment team that analyzes the current state of industry threats to your application?

5. Describe the Encryption techniques and key management abilities that you employ to store customer confidential information?

6. How do you secure communications protocols for communication between vendor and Company (SFTP, HTTPS, SCP, SSH)?

7. How do you limit and control who can access the system for support (include both personnel policies and actions as well as systems)?

8. What user repositories are supported for authentication (built-in database, LDAP, Active Directory) and do you support federation and/or SAML?

9. Describe the granularity of access control to each major feature. Can you control access and create change audit records for each page of the administration UI separately?

"Hosted contact center solution providers should exhibit best practices when it comes to security standards. The ability to encrypt data in motion as well as data at rest is a mission-critical requirement for any contact center operation."

NOTES

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About USAN

USAN helps companies profitably engage customers and deliver amazing cross-channel experiences with the industry's best cloud, premise and hybrid multi-channel customer engagement solution. From traditional telephone interactions to the web, social media and everything between, USAN's portfolio of call center products gives users infinite flexibility in the way they engage customers across channels. In addition to campaign management, back-office integration, and business process automation, USAN's offerings include Hosted IVR, ACD, and Dialers built upon a fifth-generation carrier-grade infrastructure that delivers "five nines" of availability and proven scalability.

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