

ATTACHMENT C: TECHNOLOGY REQUIREMENTS

A. Architecture and Technology

Platform Architecture

1. Provide a description of your proposed solution architecture, including network topology and flow diagrams. Include a description of telecom requirements and how the solution will interface with existing technology.
2. Describe historical reliability and uptime availability metrics as well as capabilities provided in the event of down time or telecom failures.
3. Please explain how system related issues/outages are communicated to Customers?

Technology

1. Describe workstation requirements, browser compatibility, any third-party software requirements and examples of application screens. Include OS and virtual machine compatibility.
2. Is that platform compatible with Virtual Desktop Infrastructures (VDI)?
3. Describe how your system will interface with an on-premise PBX.
4. Describe how calls will flow.
 - a. Include descriptions and diagrams of physical interfaces to the PBX and your cloud services infrastructure.
5. Describe how calls may be transferred (both warm and cold) from the contact center to other extensions, internal and external.
6. Describe your disaster recovery operations and architecture.
7. Describe your ability to capture ANI and caller-id for incoming calls and what is reported on outgoing calls.
8. Describe how your system performs with industry standards for sound fidelity, jitter, packet loss and latency and other routinely used performance metrics.

Compliance / Security

1. Describe the security features of your solution.
2. Does your platform support Single Sign On (SSO)? If yes, please describe.
3. Describe how your company's security policies are compliant with any relevant industry standards.
4. Describe your solution's role-based access (RBAC) capabilities.
5. Is your platform SOC2 compliant? If yes, please provide a copy of the SOC2 report with your RFP response.
6. Describe your systems management tools including:

- System performance monitoring
 - Administrative tools for designing call / contact flow
 - Administrative tools for recording / importing announcements
 - Administrative tools for monitoring and filtering of alarms
 - Administrative tools for creating dashboards and real-time statistical monitoring
7. Describe how the administrator can implement changes, additions and deletions to things such as contact routing flows, agent skills, IVR menu trees, dialing campaigns, announcements etc.

CRM / Ticketing

1. Does your platform have a native CRM/Ticketing solution?
 - a. If yes, please describe.
 - b. If no, do you integrate with other solution providers?
 - c. If yes, will you partner with said providers as part of the RFP response?

B. Contact Center Features and Functions

In-Bound Call Routing / ACD

1. Describe the capacity of your solution in terms of:
 - Configured agents & scalability
 - Call Queues capacity/handling
 - Routing schemes
 - Number of steps per routing scheme
 - Music on hold choices
 - Number of messages that can be played while on hold
 - Available information and other capabilities while on hold
2. Describe how your system supports routing based on ANI, DNIS and options selected in IVR.
3. Describe how your system supports skills-based routing.
4. Describe the capabilities of prioritizing calls including dynamically such as age of call.
5. Describe how calls can be routed to the last agent spoken with.
6. Describe the option for handling a call that is not answered by an agent.
7. Describe how service levels can be defined for inbound queues.
8. Describe your system's ability to force an agent's state.
9. Describe your system's ability to set an agent to "unavailable" if a prior call is not answered.
10. Describe how different messages can be played based on queue statistics and wait time.
11. Describe how your system informs callers of their place in queue and projected wait time.
12. Describe caller's ability to leave a voicemail message or receive a call back.
13. Describe your system's callback features with specifics on triggering its offering and describe all options the caller has for scheduling call backs.

Outbound Dialing

1. Describe the features of your outbound calling functions
2. Describe how your system supports blending of inbound and outbound calls
3. Does the platform record all outbound dialing?

Email Routing and Management

1. Describe how your system routes emails.
2. Describe how the system integrates with CRM/Ticketing applications.
 - a. Which CRM/Ticketing applications does your platform integrate with?
3. Describe how emails are assigned to agents or queues.
 - a. Is this based on the mailbox to which it was set?
 - b. Is analysis based on subject-line content or message content?
 - c. Can agents select specific emails from the queue? If yes, how is this managed?
4. Describe your method for managing service levels for reply messages.
5. Describe how message priority is assigned (for example, by time since received, subject).
 - a. How can the priority of an email be escalated?
6. Describe email/ticket retention capabilities.
7. Describe the system's ability to support automatic acknowledge messages and agent response templates.
8. Does the system use a proprietary email client or standard such as Outlook?
9. Describe how your email system supports integration to common email systems, including compliance with email integration standards.
10. Does your system require its own email server, or can it leverage existing corporate email resources?
11. Describe your system's ability to prepopulate common greetings and answers.
12. Describe how emails are kept secure, both in transit and at rest.

Web Chat Routing

1. Describe how your system routes web chats.
2. Describe how the system integrates with CRM/Ticketing applications.
3. Describe how web chats are assigned to agents or queues.
4. Can agents select specific web chats from the queue?
 - a. How is this managed?
5. Describe your method for managing service levels for reply messages.
6. Describe how chat session priority is assigned (for example, by time since received, subject and so forth).
7. How can the priority of a web chat be escalated?
8. Describe how chat sessions are archived and how supervisors and/or agents can access archived responses.

9. Describe the system's ability to support automatic acknowledge messages and agent response templates.
10. Does the system use a standard versus a proprietary web chat client?
11. Describe your system's ability to transfer a chat session to another agent or supervisor.
12. Can web chat sessions be easily shared with customers?
13. Describe how web chats are kept secure.

SMS Routing

1. Describe how your system routes Short Message Service (SMS) messages.
2. Describe how your system supports two-way SMS messaging.
3. Describe how your system supports SMS messaging with mobile phones.
4. Describe how the system integrates with CRM/Ticketing applications.
5. Describe how SMS messages are assigned to agents or queues.
6. Can agents select specific SMS messages from the queue?
 - a. How is this managed?
7. Describe your method for managing service levels for reply messages.
8. Describe how SMS messages are archived and how supervisors and/or agents can access archived responses.
9. Describe the system's ability to support automatic acknowledge messages and agent response templates.
10. Does the system use a standard versus a proprietary SMS messaging client?
11. Describe how SMS messages are kept secure, both in transit and at rest.

Multimedia Routing

1. Can multiple types of objects, such as phone calls, emails and web chats, be placed in the same queue? Please describe.
2. Describe how the system provides a visual indication to the user of the type of object that is in the queue.
3. Describe how different types of objects can be assigned different priority levels in the queue.
4. Describe how queue objects can be routed differently based on their type; for example, can phone calls be routed to one skill set as opposed to emails?
5. Describe how queue objects can be escalated to a supervisor if they have not been processed in a sufficient time frame.
6. Describe the tool(s) used to administer the different media types, including business rule management.

Interactive Voice Response

1. Do you provide a voice prompter/auto attendant?
2. Is your voice prompter/auto attendant provided by your full featured IVR?
3. Briefly describe your system's IVR capabilities, including integration with the ACD.

4. Describe how your IVR can collect both alpha and numeric input.
5. Describe how your IVR can support multiple languages.
6. Describe the management tools for configuring and modifying call flows and prompting.
7. Describe the skill set needed to utilize your IVR management tools.

Customer Experience – Surveys

1. Describe your system's ability to support post-call surveys, including the options available to trigger the survey, how/where the data collected is stored, and the reporting and analytics available for this data.
2. Can surveys be generated for interactions other than phone calls such as web chat and email?
3. Please describe the process for developing and publishing survey questions.
4. Can multiple surveys be conducted for different market segments?

C. Contact Center Administration Tools

Agent Desktop

1. Describe your system's agent desktop environment. Provide screen shot examples.
2. Describe how agents can alert supervisors of problem calls.
3. Describe the environment used for developing agent desktops.
4. Describe how thin- and/or thick-client interfaces are supported.
5. Describe how agents can transfer/conference a call to another agent, subject matter expert, or external number, and indicate whether this process can be automated.
6. Describe how agents can switch between skill groups or activities (for example, between media types, or from inbound to outbound call support).
7. Do Agents have the ability to take over “remote control” of customers desktops if needed?

Remote Agents

1. Describe your ability to support remote, work at home, and call center agents with IP soft phones, digital, and/or analog sets.
2. Describe the remote user functionality; list any limitations for remote workers in comparison to on premise ACD agents.
3. What equipment is required at the remote worker’s location to successfully implement the system?
4. Can the supervisor monitor / record calls handled by remote workers?
5. Are call related statistics from the remote worker integrated with the overall reporting or are they separate?
6. Describe any changes to the agent desktop environment for agents that work remotely.

Supervisor Desktop

1. Describe the supervisor's desktop application, including how it provides for the monitoring of agents and inbound call/contact volumes and the status of associated agents in real time. Provide screen shot examples.
2. Describe how the supervisor can change an agent's status (for example, from "after-call work" to "ready").
3. Describe how the supervisor can have visibility of agents to monitor performance and make changes to agents' skills assignments.
4. Describe how thin- and/or thick-client interfaces are supported.
 - a. How can the application be accessed by a tablet or other mobile device?
5. Describe how the supervisor desktop tool can be used to alert the supervisor to agents experiencing problem callers in real time.
6. Describe how the supervisor can use the desktop tool to quickly listen in on agent phone interactions and provide coaching/whispers or barge in when necessary.
7. Describe the process of moving agents from one team to another on your system. When agents are moved, can the agents' preferences and skills stay with those agents?
8. Describe the options available for setting alerts/SLA's for longest call in queue and number of calls in queue (among others) and option for alerting staff and or supervisors.
9. Describe the tools your system has for quality management including methods of evaluating and scoring agent interactions.

Real-time Monitoring and Reporting

1. Describe your system's ability to provide real-time monitoring and reporting of agent activity and overall contact center performance. Include a description of the information available to supervisors regarding team performance, as well as the ability to drill down on individual agent activity and listen to specific calls. Please provide screen shot examples.
2. Describe how access to specific real-time reporting data can be limited to specific users.
3. Describe how supervisors can create real-time alerts based on contact center statistics.
4. Describe the information available to supervisors and/or agents regarding calls/contacts in queue (for example, caller name, caller ID or ANI, duration of call, and so forth).
5. Describe the summary information regarding the queue in real time (for example, number of calls in queue, longest call waiting, service level and so forth).
6. Describe all summary statistics and standard real-time reports available.
7. Describe how real-time statistics can be displayed in graphic form.
8. Describe how supervisors can move contacts in real time from one queue to another queue on their screen or move a contact to an available agent to get it answered/responded to.

Historical Reporting

1. Describe your system's ability to provide historical reporting of agent activity and overall contact center performance. Include a description of the information available to supervisors regarding workgroup and team performance, as well as the ability to drill down on individual agent activity.
2. Describe your system's reporting architecture, including database formats supported.
3. Describe how access to specific historical reporting data can be limited to specific users.
4. Describe how reports can be scheduled and distributed to a common set of recipients.
5. Describe all summary statistics and standard historical reports available.
6. Describe how reports can be customized.
7. Describe the system's capability of exporting performance data.

Wallboard Displays

1. Describe your system's ability to display real-time reporting data on a wallboard through a dashboard ticker or TV screen.
2. Describe how real-time contact center performance data can be displayed as compared with service-level and KPI targets.
3. What third-party wallboard systems do you support?
4. Does your system provide/support Gamification? If so, please describe.

Call Recording

1. Describe how your system can support 100 percent call recording for inbound and outbound calls.
2. Describe the recording architecture supported by your system.
 - a. Can the system record a call between agent and supervisor when the agent puts the caller on hold?
3. Describe your system's ability to record agent desktop screens, including multiple screens and in a virtual desktop environment, including any ability to record screens in after-call work mode.
4. Describe your system's ability to store call recordings. For example, can it store calls for 90 days and support an automated process to purge or archive calls based on a set of rules?
5. Describe the format the call and screen recordings are stored in (for example, MP3, WAV, etc.).
6. Describe how your system enables supervisors to access recorded calls and call details.
7. Describe how your system leverages CTI and GUID information to index calls for retrieval.
8. Describe your system's ability to record a call end to end, even if it is transferred.
9. Describe options for not recording sensitive data, along with options for encryption.

D. Implementation, Training and Support

System Installation

1. Describe your implementation strategy, including:
 - Average time frame of implementation
 - Responsibilities of YHI during implementation
 - Resources required from YHI
2. Describe your company's ability to provide pre-installation and post-installation consulting.
3. Describe any services that your company offers to complement the proposed solution.
4. Describe the key deliverables your project team typically provides.
5. Identify and describe the role of any third parties that your company plans to employ to implement all or specific parts of the proposed solution.
6. Describe your company's process for documenting the system deployment, including relevant system configuration and customization.
7. Describe the best practices that your company employs to realize maximum benefits during initial implementation.

Training

1. Provide an overview of your company's customer training program.

Include:

- Where the training is conducted (online, on-premise)
- Courses available
- Options for customized training
- Train-the-trainer programs
- Online training options

System Maintenance and Support

1. Describe how your company's customer service is organized and how it operates.

Include:

- Options for help desk availability and response times
 - How the help desk is reached
 - Process for handling escalations
 - Availability and requirements for remote support
2. Describe the SLAs supported by your organization and any compensation provided for missed delivery.
 3. Does your company support a service level of 99.9% or greater?

4. Describe how support will be provided and coordinated for any aspects of your solution that are to be supported by a third party.
5. Describe your company's maintenance offerings.

Include:

- How and how often upgrades are conducted?
 - How are Customer's notified of upgrades?
6. Describe the responsibilities your company takes to implement software patches or updates.
 - a. Are they tested and certified in a test environment before production deployment?