

# Attachment C: Technical Questions

## 1.0 - Automatic Call Distribution (ACD)

- 1.1 Does the solution support a callback option in a queue?
- 1.2 Can queues be weighted for priority?
- 1.3 Does the solution allow for routing of callers based on recent interactions with an agent?
- 1.4 How many calls can be queued?
- 1.5 What is the maximum number of queues?
- 1.6 Can a call be rerouted back to the same agent if available within a 24-hour period or other designated time?
- 1.7 Does the system allow for on-hold music and advertising?
- 1.8 Can queues overflow to alternate destinations based on pre-defined criteria i.e., wait time or number of callers in queue
- 1.9 Can skills be assigned to all channels of communication?
- 1.10 Please describe the distribution of voicemails left in ACD queues
- 1.11 Are Agent licenses concurrent or named?
- 1.12 Do you have blended agent licenses?
- 1.13 Can agents send SMS or email instructions natively within the app during a call to provide forms or instructions?

## 2.0 - Interactive Voice Response (IVR) and Interactive Virtual Agents (IVA)

- 2.1 Does the solution offer natural language processing (NLP) across all channels? What languages are supported for NLP?
- 2.2 What NLP engine/s is utilized by your platform?
- 2.3 What languages does the IVR solution support?
- 2.4 Does the solution support priority routing of specific callers based on ODBC compliant database lookups?
- 2.5 In what ways can the IVR/IVA solution identify callers for routing purposes? (ANI, DNIS, Voice recognition, Database lookup, etc.)
- 2.6 Is there a limit to the number of interactions in the IVR or IVA?
- 2.7 What channels does your IVA support?
- 2.8 Does your IVA allow for low code building of solution tracks?
- 2.9 How is IVA priced?

## 3.0 - Omnichannel Capabilities (e.g., Secure Chat, Secure Email Forms, SMS capabilities)

- 3.1 What channels are supported by the solution?
- 3.2 Can interactions (voice/email/SMS) directed to specific users be routed through the solution for tracking and overflow purposes?
- 3.3 Can the solution ingest webforms or other activities as queued items?
- 3.4 What is the max number of text interactions that can be supported by an agent?
- 3.5 Can an interaction be seamlessly migrated between different channels for continued service?

3.6 Can IVA be offered in all channels?

#### 4.0 Outbound Dialing

4.1 Does the solution support click-to-dial for outbound phone calls?

4.2 Does the solution offer a preview dialer allowing the agent to accept and review the interaction before placing the outbound interaction?

4.3 How are outbound call lists added to the solution?

Can agents operate in a blended outbound/inbound queue status with priority given to inbound interactions?

#### 5.0 WEM (Workforce Engagement Management) and Workforce Management (WFM)

5.1 How is the WFM forecasting adjusted for seasonality?

5.2 Does the WFM solution support shift swaps?

5.3 What integrations does the WFM solution offer to backend systems like ADP?

5.4 How does the WFM platform account for the specific schedule conflicts of agents? (Joan can't work Mondays or Thursday afternoons)

5.5 How does the system notify supervisors when agents are out of adherence?

5.6 Is the WFM solution native to the platform or a 3rd party application?

5.7 Does your solution support sentiment and keyword alerting?

5.8 Please describe the offerings related to customer survey

#### 6.0 Quality Management

6.1 How are recorded interactions stored? What is the process for archival?

6.2 Does the QM solution allow supervisors to search for calls based on sentiment and keyword?

6.3 Can the solution transcribe all calls? Languages?

6.4 Can the download of recorded content be automated and if yes, how so?

6.5 What is the cost of content stored on the platform?

6.6 Describe the survey tools available?

6.7 Does your solution support NPS or CSAT scoring?

6.8 Does your solution offer wallboards for agents and supervisors? Please describe

6.8.1 What customization of the wallboards is possible?

6.9 Lead agents able to shadow new hires – see screen whisper etc.

6.10 Does your QM solution sort calls based on pre-built scorecard templates? Can the solution use AI to automate scorecards?

#### 7.0 Reporting

7.1 What formats are supported for the export of data?

7.2 Can specific reports be automated for delivery into a file folder or email address?

7.3 How long is historical data stored? Is there an additional cost for the long-term storage of data?

7.4 Can reports be presented natively on the platform in graphical form?

7.5 Does your solution support disposition codes? If so how many and at what depth?

## 8.0 Agent and Supervisor Experience

- 8.1 Does your solution have a browser-based agent application?
- 8.2 What operating systems are supported to run the desktop client?
- 8.3 Does the solution support the use of Virtual Desktops? Please provide all documentation related to support of VDI deployments that match our environment.
- 8.4 Does your solution offer a mobile client for agents on the go?
- 8.5 Does your solution allow agents to see the status of queues and other agents in the software client?

## 9.0 CRM/Ticketing (Native vs Integrated)

- 9.1 Does your solution offer a basic native CRM/ticketing system for logging of client interactions with notes?
- 9.2 What CRMs does your solution integrate with natively?

## 10.0 Compliance and Security (Datacenter Location Disclosure along with any associated certification documentation)

- 10.1 Is your solution HiTRUST validated by an authorized CSF Risk assessor?
- 10.2 Does your solution meet the requirements of NIST 800-53 revision 5?

## 11.0 Integrations

- 11.1 Does your solution support sync with OKTA or Active Directory?
- 11.2 Describe integration to Outlook? Can individual email boxes be delivered as a queued item?
- 11.3 What SSO platforms does your solution support?
- 11.4 Does your platform support Multi-Factor Authentication?

## 12.0 Implementation and Support

- 12.1 Please describe your implementation process
- 12.2 Will the deployment team be internal staff or a 3rd party Integrator?
- 12.3 If 3rd party integrator, please provide – 3 reference accounts installed in the last 12 months – Level and quantity of certified Project Managers and Technicians on the product –
- 12.4 Please provide an example Roles and Responsibilities Outline for deployment including Integrator (if applicable), Supplier and end-customer (Your Health Idaho)
- 12.5 What are your published SLAs related to response time for critical and non-critical events?
- 12.6 What are your published SLAs related to uptime and performance?
- 12.7 Do you offer a Technical Account Management Team? What is the additional cost for this service and what is included?

## 13.0 Training and Documentation

- 13.1 Does this proposal include instructor-led training? Is this training performed live or remotely?
- 13.2 Will training videos be made available for staff that are not able to attend live

training?

13.3 What training is provided to administrators of the solution?

14.0 Integration into Knowledgebase

14.1 Can the solution present agent with link articles from Knowledgebase based on keyword identification through conversation. IE – I need to reset my password presents a guide to resetting password.

15.0 Integration into backend system

15.1 Allow client to check the status of a ticket by entering the ticket number or some variation of open case

15.2 Identify caller and associated open tickets

### Additional Questions:

1. Does your solution offer the ability to set designated work hours for upgrades to be performed after hours?
2. Please explain your Service Level Agreement.
3. Ticketing Systems, what does this look for support/help?
4. After the sales is made, what happens to the account?
  - a. Technical Account Management
  - b. Relationship Account Manager
  - c. Sales Account Manager
5. Do you offer User Training/Videos?
6. Do you offer Administrative Training?
7. Does your solution provide a backend UI for designing call flow or IVR/IVA?
8. Are there additional costs associated with additional training?
9. Are there storage limits for call recording/screen recording?