



# EXPO NEWS NETWORK

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**NEW ORLEANS, LOUISIANA  
CALL CENTER**

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**REQUEST FOR PROPOSAL**

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## REQUEST FOR PROPOSAL NEW ORLEANS CALL CENTER

### PART A – PRELIMINARY INFORMATION

#### SECTION 1. INTRODUCTION

##### 1.01 About The Expo News Network (<http://www.exponewsnetwork.com>)

The Expo News Network (ENN) is a start-up enterprise. ENN will be a multi-platform electronic media outlet that:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

##### 1.02 The [REDACTED] Call Center: Inbound and Outbound

Superlative customer support, both for ENN's business clients and *their* customers and prospects, will be vital to ENN's business, growth, and ultimate success.

To that end, ENN will create a new call center<sup>1</sup> in [REDACTED]. The call center will initially consist [REDACTED] and will have combined inbound *and* out-bound functions and capability.

The call center will promote the overall ENN objectives in the table opposite.

| CALL CENTER OBJECTIVE | DETAIL     |
|-----------------------|------------|
| [REDACTED]            | [REDACTED] |
| [REDACTED]            | [REDACTED] |
| [REDACTED]            | [REDACTED] |
| [REDACTED]            | [REDACTED] |
| [REDACTED]            | [REDACTED] |

<sup>1</sup> Given the various conduits through which information is received, routed, and transmitted—usually via a converged and integrated IP network—the term "call center" has become somewhat of a misnomer. This type of facility is now frequently referred to as a "contact center", but in this RFP the term "call center" is used for convenience.



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### 1.03 Project Schedule (Subject To Change)

|                                                     |                        |
|-----------------------------------------------------|------------------------|
| RFP Release Date                                    |                        |
| Deadline for Submitting Written Questions           |                        |
| Responses to Vendor Questions                       |                        |
| Deadline for Submitting Proposal                    |                        |
| Oral Presentations/Discussions (if required by ENN) | to Be Determined (TBD) |
| Proposal Revisions (if required by ENN)             |                        |
| Anticipated Award Decision/Contract Negotiation     |                        |
| Contract Start                                      | to Be Determined (TBD) |
| Call Center Begins Full Operation                   | to Be Determined (TBD) |

## SECTION 2. FUNDAMENTAL SYSTEM SCOPE AND CAPABILITIES

### 2.01 "Blended", IP-Only (Software-Based) System

ENN requires a highly reliable, easy to maintain, "blended" inbound/outbound system that will (a) operate on a single-network (converged voice and data network), IP-only (software-based), Windows/Intel-driven platform and (b) be capable of seamlessly transitioning between inbound and outbound calls, and (c) enable centralized management and reporting. This system will:

- (a) Offer multi-media customer service via a menu of voice, emails, web, fax, and self-service.
- (b) Seamlessly integrate self-service with immediate and deferred response options.
- (c) Have blended agent capability.
- (d) Enable agents to work efficiently through easy-to-use PC screen graphics and applications.
- (e) Have robust routing capabilities tied to ENN's business rules.
- (f) Have robust, enterprise-centric data collecting and extracting capabilities, and on-demand consolidated and customized reporting capability.
- (g) At inception, accommodate 312 on-site seats (agents and supervisors), with scalability sufficient to easily add and accommodate off-site (including at-home) or outsourced agents and multiple call centers at various sites.
- (h) Be easy to service and maintain (web-based administration interfaces), with certified dealers in or around New Orleans.

### 2.02 Required Capabilities: Inbound

- (a) Voice over IP (VoIP) functionality
- (b) Dialed Number Identification Service (DNIS)
- (c) Network-level dynamic routing by ANI (caller ID)
- (d) ACD (Automatic Call Distribution)
  - Announcements (delay messaging)
  - Music/messaging on hold
  - Skills-based call routing
  - Peak volume call re-routing
- (e) Customer inquiry capabilities:
  - Immediate assistance via:
    - live agents
    - web chat



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- immediately escalated emails
- Session Initiated Protocol (SIP)
- Deferred assistance via:
  - live agents responding to emails and voice messages
  - automated response applications: announce that call may be recorded, give anticipated hold time, menu options to route call
- Self service over:
  - the web via knowledge base information
  - the phone via speech-enabled Interactive Voice Response (IVR)/Automated Response Systems (ARS)

### **2.03 Required Capabilities: Outbound**

- (a) Fast and accurate answering machine recognition
- (b) Efficient predictive dialing algorithm that delivers outbound calls to agents immediately when a customer answers
- (c) Seamless interface with the inbound system
- (d) Easily scrubbed internal and government-provided "do not call" lists.

### **2.04 Turnkey System**

ENN seeks a "turnkey" call center solution. The selected vendor will:

- Plan the system, including wiring and cabling.
  - Provide for built-in redundancy, disaster recovery, and security.
- Provide all software, hardware and interfaces (all open standards-based).
  - Off-the-shelf communication servers, telephone sets, and related components.
- Install and configure all system hardware and software. This includes:
  - Obtaining necessary permits and licenses.
  - Installing all wiring and cabling, and all building systems upgrades, necessary to install and support the system.
  - Insuring compatibility with ENN's other computer and communications systems.
- Thoroughly test the system.
- Train users and administrators.
- Provide scripts.
- Provide in-person floor support when the system "goes live" and for a specified time period thereafter.
- Provide customized software enhancements (if needed).
- Support and maintain the system hardware and software.
- Provide systems upgrades as necessary.
- Provide industry-best system warranties and uptime guaranties.

## **SECTION 3. RESPONDING TO THIS REQUEST**

### **3.01 Submissions**

All proposals must be in writing, and completed and received by ENN not later than the deadline stated above, as follows.



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- (a) Respondents must submit 2 original paper copies of the proposal, with each copy accompanied by an electronic copy in Microsoft Word or PDF format on CD/DVD/detachable hard drive, to the following address:



- (b) An electronic copy of the proposal must also be submitted via e-mail, with the subject line “Call Center RFP,” to: 

- (c) In order for a proposal to be considered complete, the following conditions must be satisfied:

- (i) **Proposal Information Sheet.** All original copies of the proposal must be accompanied by a completed Proposal Information Sheet in the form attached as Exhibit 3.01, signed by an authorized officer of the vendor.
- (ii) **Executive Summary.** The body of the proposal must begin with an Executive Summary that includes:
- A summary of the proposed solution and the specific features and functionality that differentiate it from the competition.
  - A statement of the total project cost as proposed.
- (iii) **Questions-Parts B and C.** Using Parts B and C of this RFP as a template, the vendor must answer all of the questions in Parts B and C, as presented and in the order presented—***even though some questions may overlap or be somewhat repetitive.***

Wherever appropriate in its proposal, the vendor must clearly and conspicuously denote all components, features, functions, or services that are:

- Optional.
- Not yet been released, or are in planning, development or testing phases.
- Not Windows/Intel-based.
- To be provided or developed by third parties or subcontractors.

**The vendor may attach separate documents to support its answers. However, all summary answers should stand on their own.**

**If there are features or functions that cannot be delivered as specified, the vendor must specifically identify them in the appropriate sections of this RFP.**

**The vendor should also include all appropriate alternatives and recommendations that will enable ENN to more effectively achieve the objectives stated in this RFP.**

- (iv) **Equipment/Product List.** In addition to the answers to the questions in Parts B and C, a separate itemized Equipment/Product List, including (as applicable):
- Version/model numbers of:



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- o Major equipment (e.g., servers, gateways, cards/components, agent consoles, handsets).
- o Software.
- o Services.
- o For each product, a statement as to:
  - Whether the item is included/standard or optional.
  - Whether your company is the manufacturer, distributor, or reseller.
  - Whether the item will be supplied directly by the vendor, or indirectly through subcontractors or third parties.
  - How many technicians in your company are certified on that product.
- Current available product literature describing the features and benefits of the equipment, software and services, including also technical documentation for major components.

**VENDORS PLEASE NOTE:  
USE OF REMANUFACTURED OR REFURBISHED  
EQUIPMENT OR COMPONENTS IS NOT ACCEPTABLE.**

- (v) **90-Day Plan.** A separate plan detailing how the vendor, if engaged, would approach and handle this project during the first 90 days.
- (vi) **Price List.** A separate, itemized price list for all specified and optional equipment, software and services.
- (vii) **Ongoing Costs.** A separate itemized statement of the anticipated costs to service and maintain the system and its components for (a) three years after roll out and (b) five years after roll out.
- (viii) **Total Turnkey Project Cost.** A separate, one-page summary/recap of the total turnkey cost of this project, with all pricing stated as guaranteed for at least 120 days from the proposal date

**Proposals that are incomplete, or received after the deadline, will not be eligible for consideration. All proposals (that is, the tangible proposals themselves and the tangible media embodying them) will be considered ENN's property.**

### **3.02 Certification Regarding Government Eligibility**

By signing and submitting its proposal, the vendor will be certifying that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation, by any federal, state, or local department or agency, from transactions involving the use of public funds. If the vendor is unable to so certify, then the vendor must attach an explanation to its proposal.



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### **3.03 Vendor Questions**

Vendors may email questions concerning this RFP to obtain clarification of requirements. However, no questions will be accepted after 05/21/2008, 6 p.m. CST. Email questions must be sent to [REDACTED] with the subject line "Call Center RFP."

### **3.04 Financial Capability**

ENN may require current financial information sufficient to ascertain and confirm the vendor's ability to perform.

### **3.05 Discussions with Vendors (Oral Presentation/Negotiations)**

- (a) Each respondent must be available to respond to questions or provide clarifications about its proposal.
- (b) Each respondent must be available for negotiation meetings at ENN's request. ENN may negotiate on any all components of each proposal.
- (c) ENN may require an oral presentation, at the vendor's expense, of any proposal.
- (d) Each respondent must be available for negotiation meetings at ENN's request. ENN may negotiate on any all components of each proposal.
- (e) Until a formal contract is signed, each proposal will be considered a working document and will be kept confidential, and no press releases may be issued by either party without the prior consent of the other.

### **3.06 Disclaimer**

- (a) ENN intends to evaluate the proposals submitted based on the best overall solution and value (as determined by ENN), not necessarily the lowest price.
- (b) Nothing contained in this RFP will obligate ENN to enter into a contract with any vendor for all or any part of the system. ENN may reject any or all responses to this RFP even if all the stated requirements are met. ENN may also negotiate with more than one vendor simultaneously and award the project (in whole or in part) to any vendor without notice to any other vendor.

### **3.07 Contract Terms and Conditions**

No binding contract will exist until ENN and the vendor sign a formal written contract containing mutually acceptable terms and conditions. However, that contract must contain provisions substantially identical to those stated on Exhibit 3.07 attached to this RFP.

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**PART B BEGINS ON NEXT PAGE.**



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**PART B – VENDOR BACKGROUND**

Please answer each of the following questions in detail.  
Attach additional sheets if necessary.

**SECTION 4. COMPANY INFORMATION**

**4.01 Company Overview /Call Center Expertise**

Supply a company overview, including:

- (a) How long has your company/division been in business?
- (b) How long has your company/division been providing call center systems?
- (c) How many employees do you have in the company/division?
- (d) How many call centers sites and stations have you provided?

**4.02 References**

Provide a minimum of two references for call center systems similar to that described in this RFP. Include contact names, addresses, and telephone numbers. The contact named must have direct responsibility for the functionality and performance of the system and be able to address technical questions.

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**PART C BEGINS ON NEXT PAGE.**



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**PART C – THE PROPOSED CALL CENTER SYSTEM**

**Please answer each of the following questions in detail.  
Attach additional sheets if necessary.**

**SECTION 5. ARCHITECTURE / INFRASTRUCTURE**

**5.01 Overview**

- (a) Describe the overall architecture of the proposed system, based on the parameters stated in Section 2 of this RFP.
- (b) Provide diagrams that illustrate all of the major network components, their roles and interactions with each other, and how the system will connect to, and interface or integrate with:
  - (i) ENN's Local Area Network (LAN) and ENN's enterprise-wide computer network (Computer/Telephone Integration/CTI).
  - (ii) The Public Switched Telephone Network (PSTN).

**5.02 Specific Questions about Architecture**

- (a) Is the proposed system based on a one-network, IP architecture?
- (b) Is the system based on open standards?
- (c) Does the system support IP telephony?
- (d) Does the system use industry-standard servers/components that are readily available in the marketplace?
  - (i) Standard, readily available, VoIP cards?
  - (ii) Standard, readily available, telephony interface PCBs, with standard PCI/AGC server slots?
  - (iii) List and describe any components that are proprietary or are not industry-standard and readily available in the marketplace.
- (d) Does the proposed architecture provide for distributed and redundant servers?
- (e) Does the proposed architecture include an Application Program Interface (API)?
- (f) Are the screen pop and data-directed call routing applications native to the system?
- (g) How will the communication server system interface with ENN's LAN?
- (h) Does the system integrate with ODBC-compatible databases?
- (i) How many ODBC-compatible databases can be accessed at any one time?



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- (j) Does the proposed system support a software developer's kit that a customer or third party developer can use to create their own applications or enhancements?
- (k) List all third-party handsets/headsets that are compatible with the proposed system.

### 5.03 Environmental Considerations

- (a) Are all components of the system rack mountable?
  - (i) What size racks?
  - (ii) How much rack space (in rack units) are required to mount the proposed equipment?
- (b) Does the system run on standard 110VAC power?
- (c) Will the system require a dedicated electrical circuit?
- (d) Does the system entail any particular environmental/HVAC considerations (such as power requirements, special cooling requirements, and physical space requirements) that are different from a company's standard computer room?
- (e) Does the proposed system conform to all UL and FCC requirements?

### SECTION 6. SCALABILITY

- (a) How many total sites and stations can the proposed architecture support without any further upgrades/expansions of either hardware or software?
- (b) Describe how the system can be scaled up to 1,500 handsets across multiple sites, including at-home agents. Include the quantity of additional equipment and components.
- (c) Describe how workflow rules can be tailored for each site.
- (d) Describe how the system supports routing between sites of phone calls, email, and web sessions?
- (e) Describe how the system will support data gathering and consolidated real time and historical reporting across all sites and agents and all contact types.
- (f) Can the system administrator(s) and supervisors access the multiple sites from any point on the network? Centrally? Off-site? From their homes?
- (g) Recognizing that ENN will want to centralize and consolidate telephone-specific administration, perhaps to its headquarters, describe how the proposed system will accommodate this.
- (h) Identify which services, if any, must be administered locally.
- (i) Describe how the system can be configured (at inception or in the future) to enable direct communication with other (third party) call center/fulfillment systems.



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- (j) Recognizing that initially, this call center will be internal to ENN, describe how the system can be configured (at inception or in the future) to enable ENN's call center to be hired by third parties as an external, out-sourced call center.

### SECTION 7. FUNCTIONALITY

#### 7.01 General Questions

- (a) The ENN call center system must support routing rules that (i) are dictated by business logic, and (ii) apply across the full spectrum of customer contacts (voice, email, web sessions) to yield a seamless and consistent customer experience.

Explain how the proposed system will achieve this objective.

- (b) Describe what flexibility the proposed system will have to departmentalize—that is, to enable ENN to easily create and change (from time to time and as needed):
- (i) Separate departments for inbound calls, for outbound calls, and/or for e-mail communication.
  - (ii) Capability for "universal agents" to handle all contact types.
- (iii) Can the proposed system provide classes of service based on a PIN number?
- (iv) Can the proposed system restrict individual numbers from being called?
- (v) If call quality on the IP network degrades, what options are available to put calls through to the traditional telephone network (PSTN)?
- (i) Describe the equipment necessary to provide digital access for 5 outgoing lines to the PSTN if 250 IP handsets are in use.
  - (ii) Describe the equipment necessary to provide digital access for 5 incoming lines for Direct Inward Dialing (DID) service if 250 IP handsets are in use.

#### 7.02 Telecommuting/"Hoteling"

- (a) Describe how the proposed system will enable a telecommuting (at-home) or traveling employee (or supervisor/manager) to have virtual "in the office" access and presence.

How are these features secured?

- (b) Describe how the proposed system allows employees to work in any available office ("hoteling").

#### 7.03 Routing and Queuing

- (a) Explain how the proposed system prioritizes and routes phone calls, emails, and web sessions to agents, including answers to the following questions:
- (i) Does the system provide a single unified interface for handling all media types (voice, email, and web)?



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- (ii) Can mixed media be queued for agents in the same queue?
  - (iii) How is the agent notified of the type of contact being routed?
  - (iv) Can different types of media contacts be assigned different priority levels in queue?
  - (v) Can emails or web sessions be prioritized over voice calls if desired?
  - (vi) Does the system support agent group (departmental) contact assignments and skills-based routing?
- (b) Describe how the system routes contacts based on:
- (i) Information from network data such as ANI and DNIS.
  - (ii) Information from external databases.
  - (iii) Information from database queries.
  - (iv) Touchtone input from the caller.
- (c) Describe the process for configuring call workflows in the system.
- (d) Explain how the proposed system allows routing and priority to be changed dynamically without changing workflows.

### 7.04 Integrated Messaging

ENN requires that the system have integrated messaging—all methods of communication must be integrated into a single quick and seamless channel, regardless of the language or device being used.

- (a) Describe how your system will meet this requirement, including:
- (i) How the e-mail client and server software retrieves voice mail.
  - (ii) How the voice mail system retrieves e-mail text.
  - (iii) How the voice mail system generates subject lines for the e-mail system.
  - (iv) How desktop office applications such as Word/Outlook integrate with the call center system.
- (b) List the e-mail systems that integrate with the vendor's proposed solution.
- (c) How frequently do the messages throughout the proposed system automatically synchronize?

### 7.05 Telephony Features

- (a) Provide the amount of peak bandwidth per phone per call between the handset and call processor.



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- (b) List and detail the standards supported by the handsets, call processor, gateways, network switches, other network equipment and other end nodes, where applicable, that ensure end-to-end voice service priority.
- (c) On Exhibit 7.05(c) attached to this RFP, please indicate whether, and to what extent, the proposed system includes the PBX features listed therein. Also include any relevant comments.

### **7.06 Automatic Call Distribution (ACD) Features**

- (a) Describe the proposed system's ACD features.
- (b) Describe how the proposed system integrates ACD features with call center data gathering and reporting.
- (c) Describe CTI between the ACD functions and ENN's other internal systems.
- (d) On Exhibit 7.06(d) attached to this RFP, please indicate whether, and to what extent, the proposed system includes the ACD features listed therein. Also include any relevant comments.

### **7.07 Automated Attendant Features**

- (a) Describe the proposed system's built-in Automated Attendant features, including:
  - (i) How many auto attendants the system, as proposed, will support.
  - (ii) The menus available to users.
  - (iii) The capability to automatically change greetings and route calls by time of day, day of week, and holidays.
  - (iv) Accessibility via a Windows interface.
- (b) On Exhibit 7.07(b) attached to this RFP, please indicate whether, and to what extent, the proposed system includes the Automated Attendant features listed therein. Also include any relevant comments.

### **7.08 Voice/Voice Mail Features**

- (a) Provide a brief overview and description of the proposed system's built-in voice features, including IVR.
- (b) Does screen pop data transfer with each call?
- (c) Do callers have the option of leaving voice messages for call back?
- (d) Can conversations be recorded?
- (e) Please state the system's message/recording storage capacity:



## REQUEST FOR PROPOSAL NEW ORLEANS CALL CENTER

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- (i) Number of voice mail ports.
  - (ii) Number of mailboxes.
  - (iii) Maximum message/recording length.
- (f) On Exhibit 7.08(f) attached to this RFP, please indicate whether, and to what extent, the proposed system includes the voice mail features listed therein. Also include any relevant comments.

### **7.09 Specific Questions About Email**

- (a) Can emails be routed mixed with other media (voice calls/web sessions)?
- (b) Are emails routed in the same fashion as voice calls?
  - (i) Can skills-based routing be applied to emails?
  - (ii) Can emails be pushed to agents?
  - (iii) Can agents retrieve emails from the queue?
- (c) Describe the escalation process for emails.
- (d) Describe the proposed system's capability to:
  - (i) Prioritize email based on time in box or business values.
  - (ii) Defined service levels.
  - (iii) Escalate emails based on business values such as a customer's "gold status".
  - (iv) Organize emails according to categories, such as "sales", "service", "support".
  - (v) Transfer emails from one category to another.
  - (vi) Transfer emails to other agents or to supervisors.
  - (vii) Append emails to a CRM record.
  - (viii) Search for archived emails.

Are all emails archived in a central database?
- (e) Does the system use a standard or a proprietary email client?
- (f) Can the system provide historical reporting and real-time status on emails?
- (g) Does the system provide for reply and auto acknowledgement?



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### **7.10 Web Sessions**

- (a) Describe the proposed system's web chat capability.
- (b) Are web sessions routed in the same fashion as voice calls and emails?
  - (i) Can skills-based routing be applied to web sessions?
  - (ii) Can web sessions be pushed to agents?
- (c) Describe the proposed system's capability for:
  - (i) Pushing messages or URLs to customers while waiting on hold to chat.
  - (ii) Co-browsing.
  - (iii) Web callback.
  - (iv) Web conferencing.
  - (v) Organizing web sessions according to categories, such as "sales", "service", "support").
  - (vi) Transferring emails from one category to another.
  - (vii) Transferring web sessions to other agents or to supervisors.
  - (viii) Archiving chat transcripts in a central database.
  - (ix) Searching archived chat transcripts.
  - (x) Transmitting web chat transcripts automatically to the CRM database.

### **7.11 Agent Set and Productivity**

- (a) Describe the extent to which the proposed system includes:
  - (i) A single Graphical User Interface (GUI) desktop for each agent and for all contact types, including phone calls.  
  
State with specificity those system features or applications that not accessible via the GUI interface.
  - (ii) A window management tool that controls the location and placement of new windows to eliminate overlapping windows.
  - (iii) The capability for agents to transfer the information on their screens as they transfer calls to another agent or supervisor.
  - (iv) Dynamic scripting, through which the agent is prompted with a customized script or



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call-handling approach to serve the specific customer or customer type.

- (v) Call blending, through which agents can be switched among different types of inbound/outbound work at any time.
  - (vi) Send customized training and testing materials to the agent's desktop.
  - (vii) The interface and contact control features, and capabilities are accessible to remote users as well as local users.
- (b) Does the agent interface display contact information?
- (c) Can the agent press a key to display his/her statistics in a window (or box) on the screen?
- Can the screen be configured to display the agent's ranking or comparisons with other agents?
- (d) On a separate sheet, or on the master Equipment List, list and describe all telephone-related hardware, including headsets and handsets.

### 7.12 Specific Questions About Outbound Capabilities

- (a) Describe how the outbound features interface with the inbound system, including the capability to blend outbound dialing work with inbound work.
- (b) Describe the system's predictive dialing feature, including:
  - (i) Whether outbound calls are delivered to agents immediately when a customer answers (first "hello").
  - (ii) How the system distinguishes between answering machines, no answers, busy signals, SIT tones, and live answers.
  - (iii) How the system detects and remembers inaccurate phone numbers.
- (c) Describe the system's capabilities regarding call lists, including:
  - (i) How the system maintains and scrubs internal and government-provided "do not call" lists.
  - (ii) How the system maintains and concurrently calls from multiple lists.
  - (iii) Adding customers to the call list during a campaign.
  - (iv) Removing customers from the call list.
- (d) Does the system allow agents assigned to different outbound campaigns to use different dialing techniques (such as preview, predictive) at the same time? Please explain.
- (e) Explain what is required, and how much time it takes, to move an agent from one campaign to another.



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- (f) Can campaigns be modified "on the fly"? In what way(s)?
- (g) Does your system support international campaigns, including the correct processing of international telephone numbers, addresses, and postal codes?
- (h) Can the system be programmed to call selected time zones at selected times?

### **7.13 Customer Service/Customer Relationship Management (CRM)**

- (a) Describe your system's capabilities with respect to:
  - (i) Entering orders.
  - (ii) Fulfillment.
  - (iii) Generating shipping labels and return codes/authorization.
  - (iv) Verifying credit cards while the customer is on the phone.
  - (v) Enabling customers to use their favorite agent.
  - (vi) Providing different classes of service, including based on a PIN number.
- (b) Describe the system's CRM applications and capabilities, including
  - (i) How they are integrated within the system's infrastructure.
  - (ii) How a service plan can be created for individual customers.

### **7.14 Supervision**

Supervisors must be able (1) monitor and coach agents or barge in on any call/contact, (2) easily view system alerts, (3) send notes and bulletins, and (4) log off agents.

- (a) Can a supervisor access the system from anywhere on the network?
- (b) Can a supervisor implement changes, additions, and deletions for any site from any location on the network?
- (c) Can supervisors can barge in, monitor, and train from anywhere on the network?
  - (i) Can the supervisor assist the agent (including sending messages) while monitoring the agent's screen?
  - (ii) Can the supervisor select agent screens to view and monitor?
  - (iii) Can the system shadow monitor each agent without intruding (both voice and data)?
  - (iv) Can the system monitor an individual agent's statistics even if that agent moves to a different workstation/location?



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- (d) Describe the real-time information available to the supervisor, including:
  - (i) Agent/group status – those logged on, those being monitored or recorded
  - (ii) Summary screens for all agent results.
  - (iii) Automatic updates of agent results for campaigns in progress.
- (e) Describe the real-time monitoring and adjustment capabilities for outbound campaigns. Specifically, can supervisors:
  - (i) Monitor the rate at which the records from different queues are being exhausted? How?
  - (ii) Change the dialing strategy and the priorities of leads in different queues?
  - (iii) "Turn off" records from a particular queue (e.g. time zone, geographic region, area code, "do not call" lists), so that they won't be called?
  - (iv) Change the earliest and latest times that records from different queues can be accessed by the system?
  - (v) Control the pacing of calling or have system determine the best pacing? Explain.
  - (vi) See how many uncalled leads remain? Per queue?
- (f) Can supervisors access and produce supervisor/management reports:
  - (i) From a terminal in their office?
  - (ii) Offsite?
  - (iii) Via the Internet?
- (g) Describe the system's security access protocols.

Can access be customized for individual users or groups of users?
- (h) Describe the system's automated quality monitoring capabilities, including:
  - (i) Automatic capture of complete agent activities, such as recording both voice conversations and detailing agents' navigation on the system.
  - (ii) For supervisors, to retrieve, review, and score sample calls/contacts, and send scoring results to the agent, with comments.
  - (iii) For agents, to retrieve and review their calls.



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- (i) On Exhibit 7.14(j) attached to this RFP, please indicate whether, and to what extent, the proposed system includes the recording/playback features listed therein. Also include any relevant comments.
- (j) On Exhibit 7.14(k) attached to this RFP, please indicate whether, and to what extent, the proposed system includes the recording/playback features listed therein. Also include any relevant comments

### 7.15 Reporting Capabilities

ENN's call center system must be able to (1) effectively store, process, and retrieve information, (2) enable different departments to share and customize the information on demand, and (3) help ENN measure, analyze, and evaluate the entire enterprise.

- (a) Are all data throughout the call center system captured and aggregated into a single database?
- (b) Is the database searchable?
- (c) Is there an FAQ database?
- (d) Describe in detail the proposed system's capability to produce the following types of reports:
  - (i) Agent performance reports.
  - (ii) Queue performance reports.
  - (iii) IVR reports.
  - (iv) Abandoned calls, call time, and wait time reports.
  - (v) Pre- and post-contact reports, differentiating between the various reasons for customer contact (for example, information versus sales versus service).
  - (vi) Ad hoc reports.
    - How is this done?
    - Can "canned" queries be developed by management?
    - By in-house programmers?
  - (vii) Real time reports.
  - (viii) Historical reports.
  - (ix) Cross-campaign reports.
- (e) Describe the proposed system's capability regarding custom reports and their form and format, including:



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- (i) Excel spreadsheets.
  - (ii) Text.
  - (iii) Graphics (graphs, charts, diagrams, tables).
    - Can the format for graphical reports be modified?
  - (iv) Does your system provide wizards for generating reports?
  - (v) Can report criteria be saved for later use?
  - (vi) Does the reporting function store the entire report or just report criteria?
  - (vii) Can the system export data from all reports to a text or Excel file to allow for the manipulation as desired by the user?
  - (viii) Can these reports differentiate between, and compare, self-service contacts and “live” contacts such as phone, e-mail, and chat?
- (f) Can the system be customized to require an agent to enter certain data before taking the next call? Explain.
- (g) What capabilities does your system offer for measuring, analyzing, and evaluating the entire enterprise?
- (h) Does your system contain a customer opinion survey application?
- (i) Does your system measure agents' schedule adherence?
- (j) Describe the system's CRM capabilities.

Are all of the capabilities described in this section accessible from any Windows workstation given rights to do so?

### **7.16 Additional Management/Enterprise Support Capabilities**

- (a) Describe how the proposed system supports scheduling of personnel in a blended environment.
- (b) Which *workflow management systems* or applications are provided/supported?
- (c) Which *workforce management systems* or applications are provided/supported?

Describe how these systems or applications support the following:

- (i) Forecasting/planning call volumes, handle times, and overhead to determine staffing, scheduling, and other resource requirements.
- (ii) Flexible personnel scheduling, payroll and other HR considerations.



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- (iii) Change management based on "real-world", real-time conditions.  
How frequently does the system automatically update?
- (iv) Performance and adherence measurement, benchmarking, and analysis, both historical and real-time.
- (v) Agent desktop empowerment, such as submitting shift bids and trade requests, entering work preferences, and ask for vacation time,
- (vi) Strategic planning using historical and forecasted information, as well as business simulation techniques to:
  - Perform "what-if" analyses.
  - Ascertain how business changes impact plans and requirements.
  - Identify optimal performance goals and infrastructure configurations.

### SECTION 8. TRAINING

- (b) How much, and what type of, training (on-site and off-site) is included in the proposed package?
  - (i) Describe a typical training program:
    - For agents.
    - For supervisors.
    - For administrators.
  - (ii) Do you provide hands-on on-site training?
  - (iii) How much on-site floor support/training will you provide after the system rolls out? For how long?
  - (iv) Do you provide on-line tutorials?
- (c) How much training time (hours/days) is customary?
- (d) Can you customize user training? If so, at what additional cost?
- (e) Are there any class size restrictions for on-site training classes?
- (f) What training is provided for new releases? What is the associated cost?
- (g) How many trainers do you have dedicated just to training?
  - (i) What is their background?



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- (ii) Detail their call center experience.
- (h) Describe your approach to training and detail the requirements for maintaining user, administrator, and maintenance proficiency.

### **SECTION 9. ADMINISTRATION, SERVICE AND SUPPORT**

#### **9.01 System Administration**

Describe how maintenance administration is accomplished both by the service technician and the system administrator, including:

- (a) Live system programming.
- (b) Full and complete backup of voice and data on a live system.
- (c) Is service interrupted during upgrades or maintenance?

#### **9.02 Manufacturer's Support**

- (a) All hardware and software must be the current offering provided by the manufacturer, and that which receives the highest level of support available from the manufacturer.

State whether the proposed system is the latest available version of both hardware and software and if not, explain what is being proposed and why.

- (b) The proposed system must be kept up to date with periodic software upgrades providing new features and keeping the system consistent with "state-of-the-art" design.

Describe your proposed software upgrade capabilities, including frequency of new version releases, cost, how implemented, and reprogramming and retraining requirements.

State when the next version of software is expected to be released.

#### **9.03 Supply Chain**

- (a) Indicate whether your company is the manufacturer, distributor, or reseller of the proposed hardware/software.
- (b) If your company is a distributor, describe:
  - (i) The terms of your agreement with the manufacturer.
  - (ii) The manufacturer's level of support.
  - (iii) What contingencies are in place if your company does not support the product for any reason.



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- (c) If your company is a distributor or integrator of the proposed product, is your company authorized by the manufacturer to do so? How long has your company been authorized?

### 9.04 Vendor Service and Support

- (a) Describe the vendor's proposed service and support program, including:
- (i) Hardware.
  - (ii) Software.
  - (iii) 24/7 availability.
  - (iv) Staff size, organization, and responsibilities.
  - (v) An organization chart that details your ENN client team and chain of command, and depicts how you propose to handle ENN's call center account.
  - (vi) How many technicians are certified on the proposed equipment/software?
  - (vii) Do you have programmers that can create custom enhancements to the proposed software?
- (b) Will the proposed system offer:
- (i) Telephone support? If yes, is this a toll-free service?
  - (ii) On-line user help?
  - (iii) Remote diagnostic support? If so, please describe how this works.  
Is remote access password protected?
- (c) Do you have field offices? If so where are they located?
- (d) Who will manage/maintain the database in the proposed system: ENN or the vendor?  
Describe the database management system.
- (e) Describe response time guaranties.  
State if the guaranteed response time differs for:
- (i) Complete system failure (define a system failure).
  - (ii) Major service malfunction (define a major failure).
  - (iii) Minor service malfunction (define a minor failure).
  - (iv) Station outages (define a station outage).



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- (v) Service during and after warranty periods have expired.
- (f) Do you carry inventories of replacement components?
- (g) Describe regular system maintenance, including:
  - (i) Who does it?
  - (ii) How often it is done.
  - (iii) What specifically is done during each regular maintenance session.
- (h) Describe your scripting capabilities.
  - (i) Do you offer a script creation package? If so, please describe.
  - (ii) Can scripting be managed by non-technical, in-house staff?
  - (iii) Does the system include a graphical user interface (GUI) for developing scripts and call guides? Please describe.
- (i) Explain in detail the installation and warranty coverage offered, and the duration of the warranty.

Describe the available maintenance and service options after the warranty period expires.
- (j) Does your company offer a software maintenance plan which assures that ENN will have the most current version of the installed system features?

### SECTION 10. SYSTEM RELIABILITY, SECURITY, AND AVAILABILITY

The ENN call center must use reliable off-the-shelf server components, have built-in redundancy, and industry-best security and disaster recovery capability.

#### 10.01 Readily Available Components

Does the proposed system use off-the-shelf servers/components? If not, describe the custom or proprietary components.

#### 10.02 Security Features

Please describe the security features and capabilities of the proposed system, including.

- (a) Levels of authority.
- (b) Field-level security/security badges.
- (c) Screen-level security.
- (d) Signing agents on and off the system automatically or with a unique password.



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- (i) Minimum/maximum password length, and who controls the length.
  - (ii) Can the passwords of other users be viewed by the system administrator?
  - (iii) Can passwords be reset? By whom?
  - (iv) Can passwords be locked after a certain number of invalid attempts?
  - (v) Does the system provide for forced periodic password changes?
- (e) Toll fraud.
- (f) Brownout protection (such that no one can access the system at designated times).

### 10.03 Redundancies and Recovery Features

- (a) Describe the system's built-in redundancies to protect against disasters and system failures, including the following redundancies:
- (i) System processing.
  - (ii) Automatic system backup/time-stamping.
  - (iii) System "rollback" capability.
  - (iv) RAID (Redundant Array of Independent Disks).
  - (v) Backup generator(s).
- (b) Describe the system's Uninterruptible Power Supply (UPS) or battery backup features, with the built-in duration of such protection.
- (c) Describe the proposed system's capabilities to recover from a system, component, network, or power failure, or a disaster, including:
- (i) An agent's/supervisor's PC failure.
  - (ii) A database failure.
  - (iii) A voice processing failure.
  - (iv) An email processing failure.
  - (v) Routing engine failure.
  - (vi) A web processing failure.
  - (vii) Power surge.

Are all calls and contacts (including those in progress) automatically routed?



## **REQUEST FOR PROPOSAL NEW ORLEANS CALL CENTER**

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Does the system feature 100% call/contact recovery?

### **10.04 Uptime Guaranty**

Describe the vendor's uptime guaranty.

## **SECTION 11. INSTALLATION AND RAMP-UP TIME**

### **11.01 90-Day Plan**

As mentioned in Section 3.01(c)(v) of this RFP, the proposal must include a separate plan detailing how the vendor, if engaged, would approach and handle this project during the first 90 days.

### **11.02 Installation and Implementation**

In addition to the 90-day plan:

- (a) State your implementation plan and how long the entire project will take from the contract signing through installation and system roll out.
- (b) Detail the contingencies and dependencies, and the resources and information required from ENN.
- (c) Describe your testing protocols for the system.

## **SECTION 12. PRICING**

As mentioned in Section 3.01(c) (v) of this RFP, the proposal must include the following, with (a) all caveats, exceptions, and assumptions clearly stated, (b) "one time" and recurring costs clearly identified, and with all pricing methods clearly explained.

### **12.01 Project Cost**

A separate, itemized price list for all equipment, software and services, clearly identifying and differentiating all standard and optional items.

**All prices associated with proposed alternatives or options proposed must be included or will presumed to be free of charge.**

### **12.02 Cost of Ownership**

A separate itemized statement of the anticipated costs to service and maintain the system and its components for (a) three years after roll out and (b) five years after roll out.

### **12.03 Total Turnkey Project Cost**

A separate, one-page summary/recap of the total turnkey cost of this project, with all pricing stated as guaranteed for at least 120 days from the proposal date.



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**EXHIBIT 3.01  
PROPOSAL INFORMATION SHEET**

ENN CONTACT: [REDACTED] VOICE NO.: [REDACTED] E-MAIL: [REDACTED]

**VENDOR INFORMATION**

**I. GENERAL INFORMATION**

COMPANY NAME: \_\_\_\_\_

NOTICE ADDRESS FOR THIS RFP: \_\_\_\_\_

\_\_\_\_\_

CITY/STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

FEDERAL TAX ID#: \_\_\_\_\_ WEBSITE: \_\_\_\_\_

**II. PRIMARY CONTACT INFORMATION**

CONTACT NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_

VOICE NO. : \_\_\_\_\_ FAX NO.: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

**III. AUTHORIZED SIGNATURE**

SIGNATURE: \_\_\_\_\_

TYPE OR PRINT NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_

VOICE NO. : \_\_\_\_\_ FAX NO.: \_\_\_\_\_ E-MAIL: \_\_\_\_\_



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**EXHIBIT 3.07  
REQUIRED CONTRACT PROVISIONS**

1. The vendor will defend, indemnify and hold ENN, its officers, agents and employees, harmless from and against all loss, cost, and liability, including reasonable attorneys' fees and court costs, that may arise as the result of the vendor's acts or omissions in performing services under the contract.
2. The vendor will obtain and maintain in force the following insurance coverage, with ENN identified as an additional insured and issued by insurers reasonably acceptable to ENN:
  - (a) Commercial General Liability Insurance, having limits of not less than \$2,000,000 for each occurrence and \$10,000,000 aggregate, with umbrella coverage not less than \$10,000,000.
  - (b) Worker's Compensation Insurance as required under Louisiana law.

Before beginning any work under the contract, the vendor will provide Certificates evidencing the required insurance. If requested by ENN, the vendor will also provide copies of the insurance policies.
3. The vendor is an independent contractor.
4. The vendor may not assign the contract without ENN's prior written consent, except to (a) a parent or wholly owned subsidiary, (b) a successor by merger, or (c) the purchaser of a controlling equity interest in, or substantially all of the call center assets of, the vendor.



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**EXHIBIT 7.05(c)  
PBX TELEPHONY FEATURES**

**KEY:**        **S=Standard**    **O=Optional**    **NA=Not available**

| PBX TELEPHONY FEATURE                   | S | O | NA | COMMENTS |
|-----------------------------------------|---|---|----|----------|
| Account Codes - Voluntary               |   |   |    |          |
| Account Codes - Forced                  |   |   |    |          |
| Account Codes - Verified                |   |   |    |          |
| Automatic Number Identification (ANI)   |   |   |    |          |
| - ANI Call History                      |   |   |    |          |
| - ANI Callback                          |   |   |    |          |
| Automatic Route Selection               |   |   |    |          |
| Call Logging                            |   |   |    |          |
| Call Recording                          |   |   |    |          |
| Call Screening                          |   |   |    |          |
| Call Waiting                            |   |   |    |          |
| Caller ID                               |   |   |    |          |
| - Caller ID History                     |   |   |    |          |
| - Caller ID Callback                    |   |   |    |          |
| Customized Call Handling                |   |   |    |          |
| Dialed Number ID Service (DNIS)         |   |   |    |          |
| Direct Inward Dialing (DID)             |   |   |    |          |
| Call Coverage Groups                    |   |   |    |          |
| Call Forward - Routing List             |   |   |    |          |
| Call Forward - External & Remote Change |   |   |    |          |
| Call Forward - System-wide Default      |   |   |    |          |
| Call Pickup - Directed Station          |   |   |    |          |
| Call Pickup - Station Group             |   |   |    |          |
| Call Pickup - Holding/Parked            |   |   |    |          |
| Call Transfer Immediate                 |   |   |    |          |
| Call Transfer with Announcement         |   |   |    |          |
| Call Transfer with Camp-on              |   |   |    |          |
| Call Transfer Recall                    |   |   |    |          |
| Call Record to Voice Mail               |   |   |    |          |
| Conference                              |   |   |    |          |
| Disconnect Supervision                  |   |   |    |          |
| Distinctive CO/Intercom Ringing         |   |   |    |          |
| Distinctive Station Ringing             |   |   |    |          |
| E & M Tie Lines                         |   |   |    |          |
| Enhanced 911 Operation                  |   |   |    |          |
| Feature Prompting on Telephone          |   |   |    |          |
| - LCD Feature Prompting with Soft Keys  |   |   |    |          |
| - Verbal Menus                          |   |   |    |          |
| Flexible Button Assignment by User      |   |   |    |          |
| Flexible Station Numbering              |   |   |    |          |
| Flexible Line Ringing Assignment        |   |   |    |          |
| Graphical User Interface (GUI)          |   |   |    |          |
| Ground Start Lines                      |   |   |    |          |
| Handset Volume Control                  |   |   |    |          |
| Headset Compatible                      |   |   |    |          |
| Hearing Aid Compatible                  |   |   |    |          |
| Hold with Recall                        |   |   |    |          |



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**EXHIBIT 7.05(c) – CONTINUED  
PBX TELEPHONY FEATURES**

**KEY:**            **S=Standard**    **O=Optional**    **NA=Not available**

| PBX TELEPHONY FEATURE                   | S | O | NA | COMMENTS |
|-----------------------------------------|---|---|----|----------|
| ISDN Basic Rate Interface               |   |   |    |          |
| ISDN Primary Rate Interface             |   |   |    |          |
| LED Two-Color Indicators                |   |   |    |          |
| LED Flash Rates By Condition            |   |   |    |          |
| LED Line in Use (I-Use) Indication      |   |   |    |          |
| LED Line on Hold (I-Hold) Indication    |   |   |    |          |
| Message Waiting Indication              |   |   |    |          |
| - Digital Telephone LED                 |   |   |    |          |
| - Analog 2500 Set LED                   |   |   |    |          |
| - 2500 Set Stutter Dial Tone            |   |   |    |          |
| - GUI Visual Indication                 |   |   |    |          |
| - GUI Tone Indication                   |   |   |    |          |
| Multiple Directory Number Call Coverage |   |   |    |          |
| Multiple Language Choice                |   |   |    |          |
| Music-on-Hold Interface                 |   |   |    |          |
| Networking of Multiple Systems          |   |   |    |          |
| Night Service                           |   |   |    |          |
| - Day/Night Ring Patterns               |   |   |    |          |
| - Scheduled Auto Activation             |   |   |    |          |
| On-hook Dialing with Hot Dialpad        |   |   |    |          |
| Outgoing Call Restriction               |   |   |    |          |
| Paging - External Interface             |   |   |    |          |
| Park Zones                              |   |   |    |          |
| Power Failure Transfer                  |   |   |    |          |
| Redial                                  |   |   |    |          |
| - Last Number Dialed                    |   |   |    |          |
| - Last Number Received                  |   |   |    |          |
| - Voice Mail Callback                   |   |   |    |          |
| Remote Maintenance/Administration       |   |   |    |          |
| Ringing Line Preference                 |   |   |    |          |
| Speakerphone                            |   |   |    |          |
| Speed Dial Buttons                      |   |   |    |          |
| Speed Dial Directory Dialing on LCD     |   |   |    |          |
| Station Hunting                         |   |   |    |          |
| Station Status                          |   |   |    |          |
| - Do Not Disturb                        |   |   |    |          |
| - Out of Office                         |   |   |    |          |
| - User Definable                        |   |   |    |          |
| Speed Dial Directory Dialing            |   |   |    |          |
| Toll Restriction                        |   |   |    |          |
| - Toll Restriction Override             |   |   |    |          |
| - Outgoing Call Restriction             |   |   |    |          |
| Trunk Groups                            |   |   |    |          |
| Trunk-to-Trunk Connections              |   |   |    |          |
| T1 Interface                            |   |   |    |          |
| Voice Over Internet Protocol (VoIP)     |   |   |    |          |
| Volume Control - Handset                |   |   |    |          |
| Volume Control - Ringing                |   |   |    |          |
| Volume Control - Speaker                |   |   |    |          |
| Wireless Telephone Integrated Interface |   |   |    |          |



**REQUEST FOR PROPOSAL  
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**EXHIBIT 7.06(d)  
AUTOMATIC CALL DISTRIBUTION (ACD) FEATURES**

**KEY:**        **S=Standard**    **O=Optional**    **NA=Not available**

| ACD FEATURE                       | S | O | NA | COMMENTS |
|-----------------------------------|---|---|----|----------|
| Automatic Call Distribution (ACD) |   |   |    |          |
| Multiple Queues or Splits         |   |   |    |          |
| Multiple ACD Group Agent Login    |   |   |    |          |
| Skills Matching                   |   |   |    |          |
| Call Priority                     |   |   |    |          |
| Call Center Historical Reporting  |   |   |    |          |
| - Export to External Database     |   |   |    |          |
| - Run Reports Manually            |   |   |    |          |
| - Run Auto Scheduled Reports      |   |   |    |          |
| Agent Monitoring                  |   |   |    |          |
| - Track activity                  |   |   |    |          |
| - Call intervention/barge in      |   |   |    |          |
| On-line Status Display            |   |   |    |          |
| Held Calls Transfer Out of Queue  |   |   |    |          |
| Intelligent Announcements         |   |   |    |          |
| - Delayed                         |   |   |    |          |
| - Scheduled                       |   |   |    |          |
| - Queued calls                    |   |   |    |          |
| Overflow                          |   |   |    |          |
| Remote Agent Connection           |   |   |    |          |
| Wrap-up Time                      |   |   |    |          |
| Memory Protection                 |   |   |    |          |
| Remote Diagnostics                |   |   |    |          |



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**EXHIBIT 7.07(b)  
AUTOMATED ATTENDANT FEATURES**

**KEY:**        **S=Standard**    **O=Optional**    **NA=Not available**

| FEATURE                               | S | O | NA | COMMENTS |
|---------------------------------------|---|---|----|----------|
| Automated Attendant Answering         |   |   |    |          |
| Multi-level Menus                     |   |   |    |          |
| Scheduled Routing by Time of Day/Week |   |   |    |          |



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**EXHIBIT 7.08(f)  
VOICE MAIL FEATURES**

**KEY:**        **S=Standard**    **O=Optional**    **NA=Not available**

| VOICE MAIL FEATURE           | S | O | NA | COMMENTS |
|------------------------------|---|---|----|----------|
| Caller Identification        |   |   |    |          |
| Call Screening               |   |   |    |          |
| Callback                     |   |   |    |          |
| Distribution Lists           |   |   |    |          |
| Forwarding Messages          |   |   |    |          |
| Greetings                    |   |   |    |          |
| - Length Control             |   |   |    |          |
| - Personal                   |   |   |    |          |
| - System Default             |   |   |    |          |
| Message Playback Options     |   |   |    |          |
| - Playback Order Flexibility |   |   |    |          |
| - Priority (Urgent Message)  |   |   |    |          |
| - Private Message            |   |   |    |          |
| - Via Telephone              |   |   |    |          |
| - Via GUI On-screen Display  |   |   |    |          |
| Message Bookmarks            |   |   |    |          |
| Message Date & Time          |   |   |    |          |
| Message Delete & Undelete    |   |   |    |          |
| Message Purging              |   |   |    |          |
| Message Length Control       |   |   |    |          |
| Message Reply                |   |   |    |          |
| Message Waiting Indication   |   |   |    |          |
| - Digital Telephone LED      |   |   |    |          |
| - Analog LED                 |   |   |    |          |
| - Stutter Dial Tone          |   |   |    |          |
| - GUI Visual Indication      |   |   |    |          |
| - GUI Tone Indication        |   |   |    |          |
| Multiple System Languages    |   |   |    |          |
| Pager Notification           |   |   |    |          |
| Email Notification           |   |   |    |          |



## REQUEST FOR PROPOSAL NEW ORLEANS CALL CENTER

### EXHIBIT 7.14(j) RECORDING/PLAYBACK FEATURES

**KEY:**      S=Standard    O=Optional    NA=Not available

| FEATURE                                        | S | O | NA | COMMENTS |
|------------------------------------------------|---|---|----|----------|
| Total Recording                                |   |   |    |          |
| Integration and functionality with CTI         |   |   |    |          |
| Integration with quality application           |   |   |    |          |
| Multiple Recording Applications                |   |   |    |          |
| Same platform for total, ROD, and selective    |   |   |    |          |
| Maximum online storage capacity                |   |   |    |          |
| Record-on-demand                               |   |   |    |          |
| Scheduled for a specific agent by:             |   |   |    |          |
| - pre-selected times                           |   |   |    |          |
| - number of calls/one call/next call           |   |   |    |          |
| - random intervals                             |   |   |    |          |
| - repeating schedule                           |   |   |    |          |
| - customized, changeable schedule              |   |   |    |          |
| Manually/on demand                             |   |   |    |          |
| - start/stop                                   |   |   |    |          |
| - switch to another agent                      |   |   |    |          |
| Both outbound and inbound conversations        |   |   |    |          |
| Outbound only                                  |   |   |    |          |
| Inbound only                                   |   |   |    |          |
| CTI Integration                                |   |   |    |          |
| Capture/attach CTI to calls                    |   |   |    |          |
| Retrieve calls using CTI information           |   |   |    |          |
| Storage/Archiving                              |   |   |    |          |
| Hard drive storage capacity                    |   |   |    |          |
| Options when hard is full:                     |   |   |    |          |
| - archive                                      |   |   |    |          |
| - delete                                       |   |   |    |          |
| - overwrite                                    |   |   |    |          |
| - other                                        |   |   |    |          |
| Archiving options                              |   |   |    |          |
| Playback                                       |   |   |    |          |
| Supervisor access from any system PC           |   |   |    |          |
| Permanent saving of calls/clips                |   |   |    |          |
| Message deletion of demand                     |   |   |    |          |
| Silence skipping                               |   |   |    |          |
| Filter out previously reviewed calls           |   |   |    |          |
| Conversion to Wave files                       |   |   |    |          |
| Visual display of call duration/time remaining |   |   |    |          |
| Increase/decrease playback speed               |   |   |    |          |
| Voice compression to save disk space           |   |   |    |          |
| Security/restricted access to recordings       |   |   |    |          |



**REQUEST FOR PROPOSAL  
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**EXHIBIT 7.14(j) - CONTINUED  
RECORDING/PLAYBACK FEATURES**

**KEY:**        **S=Standard**    **O=Optional**    **NA=Not available**

| FEATURE                                     | S | O | NA | COMMENTS |
|---------------------------------------------|---|---|----|----------|
| Recording Management                        |   |   |    |          |
| Visually select for playback via interface: |   |   |    |          |
| - single clips                              |   |   |    |          |
| - multiple clips                            |   |   |    |          |
| - group of clips                            |   |   |    |          |
| Create user-defined folders                 |   |   |    |          |
| Search/retrieve via software based on:      |   |   |    |          |
| - Recorded group                            |   |   |    |          |
| - Recording date                            |   |   |    |          |
| - Recording schedule                        |   |   |    |          |
| - Recording duration                        |   |   |    |          |
| - Review status                             |   |   |    |          |



**REQUEST FOR PROPOSAL  
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**EXHIBIT 7.14(k)  
AGENT EVALUATION FEATURES**

**KEY:**        **S=Standard**    **O=Optional**    **NA=Not available**

| FEATURE                                              | S | O | N | COMMENTS |
|------------------------------------------------------|---|---|---|----------|
| Online Evaluation Forms                              |   |   |   |          |
| Create one or more templates                         |   |   |   |          |
| - multiple sections/pages                            |   |   |   |          |
| Customize                                            |   |   |   |          |
| - customizing wizards                                |   |   |   |          |
| - add/delete questions                               |   |   |   |          |
| - group/aggregate questions/fields                   |   |   |   |          |
| - change weighting/values                            |   |   |   |          |
| - link predefined data to form for scoring/training  |   |   |   |          |
| - insert notes and comments                          |   |   |   |          |
| • question by question                               |   |   |   |          |
| • summary                                            |   |   |   |          |
| Calculate scores                                     |   |   |   |          |
| - subtotal sections/pages                            |   |   |   |          |
| Generate agent/group performance report              |   |   |   |          |
| Calibrating Evaluations/Supervisors                  |   |   |   |          |
| "Second opinion" capability                          |   |   |   |          |
| Asynchronous form review by multiple reviewers       |   |   |   |          |
| Evaluating/reports on supervisors/reviewers          |   |   |   |          |
| Reporting                                            |   |   |   |          |
| Visual/graphic agent/group performance reports       |   |   |   |          |
| - showing changes over time/selected time intervals  |   |   |   |          |
| - customized fields/subsets                          |   |   |   |          |
| - compare scoring by multiple reviewers              |   |   |   |          |
| - showing all reviewer notes                         |   |   |   |          |
| - showing all agent calls recorded/reviewed by agent |   |   |   |          |
| Alarms to Supervisors                                |   |   |   |          |
| Based on defined schedules/performance thresholds    |   |   |   |          |