Request for Vendor Information Regarding Communication Center Solutions

Overview

The Department of Workforce Development (DWD) is exploring purchasing a cloud-based communications center solution that will provide seamless integration of a telephony solution with customer relationship management (CRM), workforce optimization, and reporting solutions. DWD seeks to provide customer service solutions that allow for 24/7 responsiveness in a variety of communication formats to best serve the needs of the public. This would provide DWD with the following benefits:

- Easy use for agents and management staff alike with the resources needed to make business driven decisions;
- Integration of inbound and outbound solutions for improved customer experience;
- Tools and reporting for staff assignment and to analyze agent performance; and
- Scalability to meet the ever-changing needs of our program.

DWD has determined that use of the NASPO ValuePoint contract, which was competitively awarded and DWD will use through collective purchasing, will allow DWD to expedite its selection of a highly qualified vendor for this project. DWD is seeking the answers to the questions it has posed below from the vendors on the NASPO ValuePoint contract to drive its procurement decisions for this purchase.

Questions and Requests for Information

- Implementation Costs
    - Does the cost of the product include implementation services?
    - Is implementation done with/through an internal team or outsourced? How fast are resources made available once a decision is made to move forward with your solution?
    - What are your estimated costs for implementation?
- Additional Resources
    - Will DWD need resources beyond the cloud-based call center solution? If so, please explain what resources you anticipate DWD will need.
    - Provide a detailed overview of the features that are built in?
    - Are there any other features that DWD may have missed in the "Requirements" section below that you want to make us aware of?
- Service Levels
    - Provide your standard Service Levels. (For example, up time, call quality, response times for issues, etc.)
    - How often are upgrades performed and how are they communicated? Do the upgrades affect service as they occur?
- Connectivity
    - How would DWD securely connect to the telephone solution (e.g., separate secure voice tunnel)? Please note that DWD has had issues with connecting through our VPN.

- **Restrictions / Limitations**
  - Are there any restrictions, such as internet speeds, that DWD would need to address to support the solution?
  - Provide a list of hardware / software (e.g., headsets, operating systems, browsers, etc.) that work with the solution or does not work with the solution (whichever is easier to provide)?
- **User Operating Systems**
  - How does your solution work with a DWD user's PC operating system? Our experience with one of our solutions is that there is a 15-minute timeout, requiring users to log in every 15 minutes. Please note that DWD would prefer integration with a single sign-on feature that is integrated with multi-factor authentication.
- **Reporting**
  - How do you approach reporting?
  - What typical reporting tools do you use?
- **Security**
  - Provide information on your security and access controls that would assist DWD.
  - Do you have any additional security or compliance certifications that may impact DWD or this project? If so, please describe these certifications and any potential impacts.
  - What security framework will DWD need to align with?
- **Emergency Shut Down or Re-Route**
  - Under your solution, would DWD be able to perform an emergency shutdown of all tenants with one action?
  - Under your solution, would DWD be able to shut down individual tenants separately?
- **Data Security**
  - Are you able to meet the confidentiality safeguard requirements under Wis. Admin. Code § DWD 149.06 and would you agree to comply with the additional requirements for data sharing at Wis. Admin. Code § DWD 149.07(4)(b) and any other applicable confidentiality or IT security requirements?

Requirements

For your consideration in providing information related to the above questions, DWD's current understanding of our requirements is detailed in the table below. Please note, DWD's requirements are subject to change pending cost, functionality, and integration possibilities and final requirements will be included in the contract.

Title	Description
Capacity Needs	1. Ability to expand/contract the system (both at the enterprise and group levels) to take a varying level of calls, but also varying levels of concurrent calls. See the estimated need above for more information on the volume.
	2. DWD's current operations are 6:00 AM CST to 6:30 PM CST but should be able to be extended as needed to meet customer demands.

Title	Description
	3. Scalability and flexibility for fluctuating call volumes – DWD's weekly call volume can be as low as 12,000 calls per week to over 6 million calls per week (2 million calls per day) with the maximum inbound calls reaching over 5 million calls in one day during the COVID-19 pandemic.
	4. At least 325 concurrent users, including call center staff and supervisors – Under current staffing levels related to the COVID-19 pandemic, DWD has approximately 600 users of the call center but may decrease the number of concurrent users to 80 during lower need times.
	5. Minimal outages of less than 1 hour.
Features	6. Have all standard call features for a call center, such as mute, hold, conference, transfer, voicemail, ability to see missed calls, etc. For voicemail, the preference would be to have the option to queue or go to voicemail and have this be something that could be configured. In addition to standard options, have the option for virtual holds that can be configured as needed (see #27, below). Voicemail interaction routing (workgroup voicemail).
	7. Handle outbound calls the same way as inbound, recording, and reporting.
	8. Create queues and control call flow within the queues. Call flow options (basic IVR) that allow set up for a variety of situations, including the ability to integrate outside call centers/vendors. This would allow a caller to make a selection, so they are connected to the appropriate solution. Preference is that we can control this set up ourselves.
	9. Provide an interface that makes for easy configurability of all administrative tools, including user assignment, call flows, and options (call-back, call wait time announcement, and waiting room). Ability to track administrative changes, upload prompts, make call flow changes, etc.
	10. Ability to provide banner messaging to agents within a group.
	11. Provide the agent answering the call with screen pops that provide caller ID and other information we collect from the caller and / or recorded greetings that automatically announce the agent.
	12. Ability to build in data collection in the call flow, such as Social Security Number (SSN), call purpose, and call history, that can then present to the agent when the call is coming in (screen pops).
	13. Ability to provide or integrate with an industry leading AI-based chatbot for calls. This would be something that can be configured as needed at the specific line level.
	14. Integration with email, short message service (SMS), and/or chat.
	15. Administrative functionality that allows DWD to assign user level roles as such as: a. Supervisor level functions such as: agent level real time statistics, coaching, barging into a call, and listening; b. Workgroup level functions such as real time longest hold and workgroup counts; and c. Training group listen in to a call (more than one user).
Configuration	16. Ability to have independent configuration at the line level for key elements. These elements include, but are not limited to, the following:

Title	Description
	a. Thresholds can be managed at a line of business level (i.e., discrete thresholds per line of business). In our current system, the number of concurrent calls is managed at an enterprise level, which has caused issues at peak times. b. All configurable items can be managed either at an enterprise level or at the line of business level. c. Security protocols will be configurable based on the needs of the lines of business. One example is that one line of business needs FTI compliance, including the ability to record on demand, but not all areas would have the same requirements.
	17. Ability to group agents and users of the system based on skill group, workgroup, and / or supervision level.
	18. Transfer availability and ability to set fast groups / speed dials at the user and administrative level.
	19. Ability to save view configurations and report configurations.
	20. Be configured for production and training environments.
	21. Provide call dispositioning / statuses that can be configured at a line of business level.
	22. Ability to record and upload messaging and configure the call flow that accompanies the messaging.
	23. Provide overflow group that allows those agents that are not scheduled as fully "ready" to be assigned a call when a threshold has been met. This may be a rollover feature whereby if the person is on hold for a certain amount of time that it rolls into another queue to be addressed.
	24. Ability to make an audible ring or visible cue (outside of the headset) for those agents that are assigned to a queue but do not receive many calls.
	25. Ability to set call priorities based on call type.
	26. For outgoing calls, ability to define what is provided in the caller ID. DWD would prefer to have the caller ID display the State of Wisconsin in some format for credibility purposes.
	27. Ability to integrate through a standard API with other systems (e.g., UI system) in a way that would allow information to flow between the two systems. The best example of this is to identify all the names in our eligibility system that are associated with a phone number so that information can be presented to the agent. Would like the "customer file" to be integrated into our existing solution.
Scheduling / Time Off Requests	28. Provide an integrated scheduling solution that allows for both time off requests and agent scheduling, so this information is in one place. This includes agents placing or submitting requests for time off, approval of that time off, tracking and monitoring of agents, availability, and compliance with the schedule. The scheduling must have the capacity to track the work type for each agent for a given day, training, and meetings.
	29. Provide call forecasting that will provide the expected call level and agents needed to meet call level. Should be able to enter known influences that could change the levels. For example, the Bureau of Benefits may enter information

Title	Description
	related to plant shutdowns and mass layoffs or the Bureau of Tax and Accounting could enter the dates billing statements are issued.
Virtual Hold	30. Provide an option for virtual hold that can be configured as is needed.
Call Quality / Monitoring Form	31. Provide integrated call monitoring or quality form that can be integrated with that call. This includes scoring and monitoring of the results in the cloud. Ability to share that call and the findings with the agent after it has been released.
Call Recordings	32. Ability to record all calls and play back as needed, along with a view of the screen that is displayed as the agent was on the call (as is available in our current contracted solution). These recordings will have to adhere to state record retention requirements.
	33. Ability to search call recordings by a unique identifier for the caller (e.g., UI account number; this assumes integration with DWD systems). Call recordings need to be tied to CRM.
	34. One subunit needs the ability for agents to select whether and when to record a call.
Real Time Alerts	35. Alerts that identify important issues. For example, service levels, call volumes that are over thresholds, etc.
Reporting	36. Provide written agreement that all data collected through the use of this system would be owned by DWD and must adhere to state records retention requirements.
	37. For reporting, provide the greatest possible detail and flexibility to give DWD options for pulling the data that it needs. DWD expects dynamic reporting and dashboarding capabilities.
	38. Ability to schedule and auto generate reports as well as build custom reporting. Custom reports that are used frequently should be able to be saved. Reporting that be done based on skill group, workgroup, and/or supervisory workgroup.
	39. Real time dashboard or real time reporting that can access both summary data and detailed data addressing all contact types and features (e.g., virtual hold): number of unique callers, repeat callers, and information on the calls received, including but not limited to the date and time of incoming or outgoing call, length of the call, wait time, disposition of the call, and any errors or issues with that call.
	40. User level call history that can be searched based on phone number or other identifying information in the system.
	41. Application Programming Interfaces (APIs) or extracts that can be integrated into a busines intelligence environment (i.e., raw data extracts). DWD uses Business Objects as its business intelligence tool.
Compliance	42. Federal Tax Information (FTI) Compliance: Ensure that IRS Section 9.18.13 on Voice over IP Networks is otherwise FTI compliant.
	43. Payment Card Industry (PCI) Compliance.
	44. All data to be transmitted and stored within the United States.
Access / Security	45. DWD prefers that there be a single sign-on option and that this is integrated with multi-factor authentication.
Monitoring	46. Ability to track real-time idle statuses.

Title	Description
	47. Ability for live listening to calls by supervisors to monitor calls remotely. Prefer ability for multiple individuals to listen at one time without being heard from remote locations. (Note: FTI requirements may apply on certain calls).
Technical	48. Ability to work within a Virtual Desktop Infrastructure (VDI) environment.
	49. Ability to work with DWD's standard operating system. Currently, we are Microsoft based.
	50. Preference for a browser-based solution (no local install).
	51. Preference for a broad range of compatible hardware (headsets) that work with the solution. Currently, DWD has a very restrictive list of hardware that will work with our given solution.
	52. Preference for a vendor with a current FedRamp authorization at a minimum impact level of Moderate.
	53. Availability of extensive RESTful APIs for easy integration with DWD business applications.