

# Business Requirements – VA529

## Table of Contents

<b>1.0</b>	<b>Overview .....</b>	<b>2</b>
<b>1.1</b>	<b>Selection Criteria .....</b>	<b>3</b>
<b>1.2</b>	<b>Schedule – RFP Process.....</b>	<b>4</b>
<b>1.3</b>	<b>RFP Response Instructions .....</b>	<b>4</b>
<b>2.0</b>	<b>Business Requirements .....</b>	<b>5</b>
<b>Section 1.0</b>	<b>Users/Usability .....</b>	<b>5</b>
<b>Section 1.1.1</b>	<b>Contact Center Agents .....</b>	<b>5</b>
<b>Section 1.1.2</b>	<b>Dial Transfers/Conference Calling .....</b>	<b>6</b>
<b>Section 1.2</b>	<b>Channels Supported .....</b>	<b>6</b>
<b>Section 1.3</b>	<b>Other Features Supported .....</b>	<b>7</b>
<b>Section 1.4</b>	<b>Reporting.....</b>	<b>10</b>
<b>3.0</b>	<b>Testing.....</b>	<b>11</b>
<b>4.0</b>	<b>Training .....</b>	<b>11</b>
<b>4.1</b>	<b>End User Training .....</b>	<b>11</b>
<b>4.2</b>	<b>Administrator Training.....</b>	<b>11</b>
<b>5.0</b>	<b>Technology/API Integration .....</b>	<b>12</b>
<b>6.0</b>	<b>Implementation Project Plan .....</b>	<b>13</b>
<b>7.0</b>	<b>Security/Compliance.....</b>	<b>14</b>
<b>8.0</b>	<b>Availability and Performance.....</b>	<b>15</b>
<b>9.0</b>	<b>Ongoing Support/Maintenance .....</b>	<b>15</b>
<b>9.1</b>	<b>Support .....</b>	<b>16</b>
<b>9.2</b>	<b>Upgrades .....</b>	<b>16</b>
<b>10.0</b>	<b>Business Continuity/Disaster Recovery .....</b>	<b>16</b>
<b>11.0</b>	<b>Pricing .....</b>	<b>17</b>

## 1.0 Overview

In 1994, the Virginia General Assembly authorized the Virginia College Savings Plan (Virginia529 or VA529), an independent agency of the Commonwealth of Virginia, to develop a program that would help citizens save for the increasing costs of higher education.

In its more than 25-year history, VA529 has evolved and adapted to meet the expanded educational landscape and the changing needs of families. At the heart of VA529's mission is providing the foundation and support individuals need to achieve future success

VA529's primary mission is twofold: first to assist families and others in achieving their higher education goals through three tax advantaged 529 savings programs, early commitment scholarship programs and similar programs, as part of its statutory mandate to help make higher education more affordable and accessible for all Virginia; and second, to assist individuals with disabilities to save for qualified disability expenses without losing certain federal means -tested benefits through its ABLEnow<sup>®</sup> and ABLEAmerica<sup>®</sup>, both ABLE disability savings programs. VA529's mission is expanding. Forthcoming is a new program with primary focus on state facilitated IRA savings, which will be sponsored by VA529 and administered through an external partner.

Virginia529 is the largest 529 plan in the country with roughly \$100.4 billion in assets under management and over 2.9 million education savings accounts as of June 30, 2021. This is accomplished by offering direct-sold and advisor-sold savings options to existing and prospective customers.

Its flagship college savings program, Prepaid529<sup>sm</sup> closed to new participants in May 2019. However, VA529 continues to service roughly 55,000 customers with a projected end date of 2039. Activity includes incoming payments on installment contracts and withdrawals from paid in full contracts. A successor defined benefit option opened in February 2021 as a portfolio option with Invest529<sup>sm</sup> program.

Invest529 is a national program, which offers 21 investment portfolio options to the roughly 288,105 existing customers for 392,853 unique active accounts as of June 30, 2021. The program experienced a 12.2% growth rate over the past year. Activity includes incoming customer contributions on account and withdrawals from accounts to account owners or beneficiaries of the program or to eligible higher education institutions. Funds can also be used towards private or religious K-12 school tuition, student loan repayment and more.

ABLEnow launched in December 2016 and is a direct-sold defined contribution savings program. VA529 is the program sponsor and manager, providing customer service operations for the program. VA529 has contracted with PNC Bank, N.A. to offer the ABLEnow program. After account opening, customer funds may be held in an FDIC-Insured Deposit Account. Once the balance exceeds \$2000, additional contributions may be invested in one or more investment portfolios offered. As of June 30, 2021, there were 12,404 existing customers and the program experienced 40.5% growth over the previous year.

Through its partnership with American Funds<sup>®</sup>, VA529 is the program sponsor for an advisor sold education savings program CollegeAmerica<sup>®</sup> and a disability savings program ABLEAmerica. VA529 is the program sponsor. VA529's most recent annual report is available at [Virginia529.com](http://Virginia529.com).

VA529 has a contact center located in North Chesterfield, Virginia (currently operating remotely). The contract center provides customers service for two college savings programs, Prepaid529 and Invest529, and for the disability savings program, ABLEnow. All customer service operations for the CollegeAmerica and ABLEAmerica programs are provided by the American Funds.

VA529’s most recent annual report is located at <https://www.virginia529.com/about/reports>.

Primary Function	Inbound Customer Service
Number of Agents	30 (others may log on as needed)
Number of Supervisors	2 (going to 3)
Days/Hours of Operation	Monday-Friday 8:30am-5pm EST
Monthly Inbound Calls	11,400 (peak)
Monthly inbound Emails	300
Other Channels	N/A
Inbound Phone Average Handle Time (AHT)	345 seconds (previously >500 seconds)
Current ACD	8x8 Virtual Office (VO) Pro & Virtual Contact Center (VCC) Pro Contact Center (see contract)

VA529 seeks to implement a comprehensive CCaaS (Contact Center as a Service) solution to support VA529s’ business transactions serviced by the VA529 Contact Center (there is a current CCaaS platform in place). The objective of this procurement process is to obtain qualified proposals for future CCaaS services.

The proposed vendor solution must demonstrate innovation in strategy and design. Where current state is described in this document, it is to inform the reader of the activities of the center; it is VA529’s expectation that the selected CCaaS vendor will provide more effective and flexible state-of-the-art design.

## 1.1 Selection Criteria

VA529 will select a CCaaS solution deemed the most suitable for its requirements. The following are the primary criteria for selecting a solution. VA529 reserves the right to consider additional criteria.

- Single owner vendor – vendor assumes responsibility for administration and management of all provided services and applications, including third party applications.
- Integration with existing systems
- Demonstrates innovative design and ability to support leading edge applications and technologies
- WFM Capabilities – Workforce Management should be integrated and comprehensive
- Quality Management Capabilities – Quality Management should be integrated and comprehensive
- Comprehensive reporting capabilities along with integration with other reporting platforms
- Strong self-service capabilities and expertise in design of advanced speech applications
- Strong implementation skills
- Solid company background
- Adherence to RFP process

- Adherence to Workshop process (if selected)
- Price/Value

The initial RFP will be evaluated according to the following criteria:

- Qualifications/Experience/Ability to Execute – 20%
- Response to Requirements – 60%
- Price – 20%

## 1.2 Schedule – RFP Process

The following provides a tentative schedule for each activity (subject to change).

September 17, 2021	RFP distributed to vendors
September 23, 2021 (8pm EST)	Vendor questions in writing to VA529
October 1, 2021	Written response to questions provided to all vendors
October 8, 2021 (8pm EST)	Vendor responses to RFP due to VA529
October	VA529 review of vendor responses
October/November	VA529 notifies finalists
October/November	Workshops (on-site/virtual)
October/November	Finalists reference checks
November/December	Vendor selected

- Workshops will be conducted with each finalist either on-site or virtual and will last for 3-4 hours. Potential agenda items include (not limited to):
- Explanation of proposed solution, features and functionality
- Demo of proposed solution, including modules (i.e., WFM, Quality Management, etc.)
- User driven activities – each finalist must allow an employee from VA529 to perform tasks on the system (e.g., set up a new call flow, set up an agent, create an ad hoc report)
- Use Cases – these will be provided by VA529 in advance
- Technology/Integration
- Information Security
- Etc.

## 1.3 RFP Response Instructions

As applicable within the RFP document, indicate compliance with stated requirements, describe capabilities and options where questions are asked, and provide supporting product information as needed to ensure our understanding by RFP section/section number. Additional instructions will be provided later in this document.

All contacts regarding this RFP must be in email and be sent to [procurement@virginia529.com](mailto:procurement@virginia529.com).

Anna Chilton, Procurement Officer  
 Virginia College Savings Plan  
 Phone: 804-717-7511  
 Fax: 804-323-2708

## 2.0 Business Requirements

This section is a narrative overview intended to complement the requirements articulated in the detailed CCaaS Requirements Matrix in RFP Appendix B (Vendor – Call/Contact Center – Requirements Worksheet). This section is not intended to suggest in any way that certain requirements are more important than others and does not describe all of the requirements articulated in Appendix A (Vendor – Call/Contact Center – Requirements Worksheet).

### **Directions for completing this section and RFP Appendix B (Vendor - Call/Contact Center – Requirements Worksheet)**

For each of the following sections please provide responses to specific question in each section and complete all sections of RFP Appendix B (VA529 – Call/Contact Center – Requirements Worksheet).

For each requirement detailed in RFP Appendix B (Vendor – Call/Contact Center – Requirements Worksheet). The proposer should place an “X” in the appropriate box that describes when the capability is/will be available. The choices are:

- Currently Available – the requirement is available in the current release
- Available Within 18 months – the requirement will be available within 18 months
- Available with Custom Code – the requirement can be available with custom code
- Not on Roadmap – the requirement is not on the current roadmap

The following sections provide supplementary clarifications, requirements, and questions to the VA529 – Call/Contact Center – Requirements Worksheet that must be responded to.

### Section 1.0 Users/Usability

This section focuses on the users of the system including agents, leadership, and critical support functions. This section includes requirements regarding equipment, user interfaces, and capabilities.

#### Section 1.1.1 Contact Center Agents

To facilitate a high level of customer service, VA529 envisions a solution that will include a robust set of Agent desktop capabilities for handling customer contacts and communications.

Desktop screen pops will provide contract center agents with key information regarding inbound customer transactions.

A comprehensive set of internal communications tools, including instant messaging and warm call transfer will facilitate seamless call escalation between agents and their managers.

- For an inbound phone call, how does the system manage how long a phone rings for a specific agent before being moved to another agent to be answered?

- Please provide details on scripting tools and capabilities.
- How do you recommend the entering of call disposition codes and assuring that they appear in both the contact center platform and the desktop system?
- Please explain the skillsets required for the System Administrator role. Which functions should be performed within the contact center and which functions should be performed by a more technical individual?

## Section 1.1.2 Dial Transfers/Conference Calling

Please describe any features that enhances the accessibility of the contact center by the disabled community.

## Section 1.2 Channels Supported

This section focuses on the various channels that may be supported by the contact center. For the initial phase of this project, VA529 plans to focus on implementing the following channels:

- Inbound Phone
- Inbound Email

Following the successful implementation of the initial channels, VA529 will consider implementing additional channels as required, which may include:

- Chat
- Chat Bot
- Social Media
- Video

### Section 1.2.1 Inbound Phone Calls

- Please provide details on the tools for setting up and managing call routing and messaging.
- Please describe your visual tool used for developing/maintaining messaging.
- Please explain how your virtual hold (callback tool) works. Please also provide the following details:
  - What options are available with virtual hold
    - Customer receives a callback and keep place in queue?
    - Customer receives a callback at a scheduled time?
    - Other?
  - Can the virtual hold message be offered at various times when a customer is holding?
  - Can the virtual hold message provide an expected wait time to the customer for when to expect a return call?
  - Can the virtual hold message provide the number of callers waiting in queue to the caller?
  - Can virtual hold be offered across multiple queues simultaneously?
  - Is there any required human intervention required to initiate the call back to the customer?

- What happens if the original caller does not answer the callback (e.g., is it requeued to be called again)?
  - Please provide details on how these calls get counted within KPIs (e.g., service level, abandon, etc.).
  - Is reporting available for the number of virtual holds requested, number of unsuccessful/successful callbacks, etc.?
  - Please provide details on additional virtual hold reporting.
- Please explain details of your current use of predictive routing (inclusive of AI) and plans for the next 2 years.

### Section 1.2.1.3 Messaging

- Please explain the storage and accessibility of pre-recorded messages.
- Please explain the process of recording a message for immediate use.

### Section 1.2.2 External Chat

- Are transcripts of chat sessions retained? What is the retention period?
- What analytics of chat sessions and chat users can you provide?
- Please explain details of your current use of virtual assistants/chat bots and plans for the next 2 years.

### Section 1.2.3 Email

- Is it possible to manually move an email to the front of a queue?
- Additional email questions are in Section 1.3.6 Workflow Management.

## Section 1.3 Other Features Supported

This section focuses on supporting features and functions that are critical to the successful operation of the contact center.

### Section 1.3.1 Contact Recording

- Please provide an explanation on how your product would provide screen recording along with any hardware/software requirements.
- Please provide details of your product's other quality management capabilities.
- Please explain how data (e.g., PII) is protected and stored for voice and screen recordings.

- What are the retention parameters for voice and screen recordings?
- Please provide options for archiving and retrieving recordings.

### Section 1.3.3 Post-Contact Surveys

Does the system consolidate response information into reports or is it presented as raw data that must be transferred to another system for reporting purposes?

### Section 1.3.4 Speech/Text Analytics

Please explain whether your Speech/Text Analytics product is home grown or is provided by another vendor.

### Section 1.3.5 Workforce Management

- Please explain whether your workforce management product is home grown or is provided by another vendor.
- Please explain how the Real Time Adherence function works.
- Please explain how the workforce management system can track/report “Time Off” to eliminate the manual process of tracking this type of information.
- Please explain the options that are available to import existing information into your solution for WFM.

### Section 1.3.6 Knowledge Database

Currently VA529 has limited tools for managing knowledge and may be interested in utilizing this capability in the future if provided by your product.

- Please provide an explanation of any knowledge database capabilities offered by your product.
  - What tools are used for allowing agents to provide feedback on accuracy of knowledge database?
  - What tools are used for uploading, managing, and updating documents?
  - What are the search capabilities?
  - Do you have a recommendation whether agent scripting should be maintained in the knowledge database or another area?
- If your product does not have knowledge database capabilities, do you leverage any 3<sup>rd</sup> party solutions for this purpose. If so, are you a reseller of the product or would VA529 have to work directly with the 3<sup>rd</sup> party?

### Section 1.3.7 IVR

- Please explain whether your IVR product is home grown or provided by another vendor.
- Please also provide information on the platform being used (if any) for natural language speech processing.
- Please describe your visual tool used for developing/maintaining IVR routines.
- Is there a test environment available for IVR development/testing?
- Please provide an explanation of how the IVR solution will integrate and perform screen-pop functionality.
- Describe real time and historical IVR reporting including:
  - Report IVR task completion rates by activity
  - Report primary activities performed by users of the IVR
  - Report of caller journeys (would include transfers to agents)
- Please explain details of your current voice biometrics capabilities and the plans for the next 2 years.

### Section 1.3.9 Workflow Management

Currently VA529 uses its desktop system for workflow management but may be interested to utilize this capability in the future if provided by your product.

- Please provide an explanation of any workflow management capabilities offered by your product.
- Can cases be set up and managed?
- What happens if a case is closed and a new email is received (e.g., Thank you email)? Does the case remain closed?
- If an email cannot be fully processed and requires follow-up work, how can it be placed into a pending status?
- What is the process to upload a document with an email?
- Please provide an explanation of any co-browsing capabilities offered by your product, including high-level security (blocking certain actions, masking sensitive data fields, etc.) and/or compliance features (SOC-II, Privacy Shield, etc.).
- Please provide your current AI capabilities and plans for the next 2 years.

### Section 1.3.10 Other

Please explain how co-browsing works including the process for obtaining permission and security.

## Section 1.4 Reporting

This section focuses on the reporting capabilities of the platform including real time reporting, after the fact reporting, and custom reporting including the tools used for the development of custom reports.

- For data elements measured by time (e.g., Talk Time), is data stored as seconds? Does the system have the capability to convert seconds to minute: seconds?

### Section 1.4.1 Real Time Dashboards/Reports

Please provide a list of real time out-of-the box dashboards/reports.

- Will agents be able to see their own daily statistics real time (e.g., how many calls answered at specific point during the day)?
- Please provide details on the tools used to create customized real time dashboards/reports, analytics, and the ability to drill down.
- Can dashboard reports/graphics be exported? Shared with other users?
- Please explain integrations available to create customized real time reporting solutions.

### Section 1.4.2 Reports (after the fact)

- Please provide a list of out-of-the box reports.
- Please provide the various time intervals for which data can be reported by from the system.
- Please provide information regarding how reports can be broken down by various criteria (e.g., shift, location, etc.)
- Please provide details on the tools used to create customized reports (after the fact), including custom reporting solutions as a service.
- Please explain integrations that are currently available to external reporting platforms/databases (specifically Tableau).
- What options are available to offload and retrieve historical data?
- Please describe any report scheduling capabilities offered.
- Please explain the options that are available to import existing information into your solution for WFM and historical call reporting.
- Please describe user training that is available.

## 3.0 Testing

- The solution must be tested in a VA529 environment prior to rollout, as new functionality is added, and for new software releases. Please confirm.
- The provider will be responsible for carrying out end-to-end functional and non-functional testing of all components specific to the VA529 implementation, including all integrations. Please confirm.
- The final test plan must be approved by VA529. Please confirm.
- Please describe your testing methodology including, but not limited to, feature testing, integration testing, performance, and security testing.
- Please describe how you provide a development/sandbox, testing, and production environment.
- Please provide a sample test plan that can be customized for the VA529 configuration.

## 4.0 Training

VA529 requires a multifaceted training program that supports both end users and systems administration. Training should include the options for classroom, web, and train the trainer.

### 4.1 End User Training

- The provider will be expected to organize training sessions at an appropriate VA529 location or through a webinar. If training occurs at a VA529 location, VA529 will provide a training location. Please confirm.
- The provider will provide electronic versions of all training materials. Please confirm.
  - Are these materials made available online and available for download?
  - Will train the trainer be available?
  - Are on-demand/pre-recorded sessions or scheduled webinars available to users.
- The provider will provide customized “Quick Reference Guides” if needed.
  - Are user guides available online?
  - Are Quick Reference Guides available online?
  - Are tutorials made available online?
- How are “What’s New” and information about upgrades to features communicated”?
- How is ongoing training provided as upgrades are made?

### 4.2 Administrator Training

- The provider will provide manufacturer certification-level system management/operations training for up to 2 CCaaS administrators. Please confirm
- Training required for administrators includes (but not limited to). Please confirm.
  - How to administer the system
  - Automated attendant capabilities
  - Performance of first level maintenance
  - Issue Escalation Process
  - Etc.
- The provider will provide electronic versions for all system-level manuals and as-built document. Please confirm.

## 5.0 Technology/API Integration

- Please provide an illustration of your system architecture
- Please provide storage and location information for various type of data (e.g., call history, call recordings, etc.).
- Please provide hardware/virtual server requirements for the VA529 data center, if any. Specify OS and database version requirements and other related requirements.
- Please provide connectivity requirements including bandwidth, etc.
- Please provide voice requirements – including but not limited to Quality of Service (QOS) being enabled.
- Please provide information about third party application compatibility and requirements (e.g., Flash, Java version)
- Please provide information on all platforms the system is running on (e.g., Linux, Microsoft, etc.)
- Do you recommend terminating calls at the VA529 data center using VA529 PBX capabilities or at the agent desktop via your provided VOIP solution)?
- What is required to support remote agents and supervisors? Describe any needed hardware, software connectivity, speed, and other requirements.
- What telephony carriers do you use?
- VA529 requires a solution that will integrate seamlessly with other key application and systems. Some applications are proprietary which will require customized integrations while some applications are leading commercially available solutions (e.g., CRM, Office365). Please confirm.

- Integrations will typically utilize a primary identifier, such as an account number, social security number, etc. Business rules may be triggered as a result of an integration driving a screen pop for an agent or a specific routing rule or message for IVR. Please confirm.
- Integrations must allow for the seamless transfer of data from the vendor solution to key systems. Please confirm.
- Currently, outbound emails route from Microsoft Exchange to a Data Loss Prevention system (provided by Semantic) that screens emails, prior to sending, for security purposes. The vendor solution cannot adversely impact this process. Please confirm.

The following software is used within the VA529 contact center to support customer service. Please indicate what systems you have experience integrating with your desktop applications for screen pop and with IVR for data exchange (read and/or write). If you have not integrated with these specific systems, please provide information about similar integrations.

<b>Customer Care Application</b>	<b>Application Function/Version/Release/etc.</b>
ERP System	ERP System with Oracle database.
Microsoft Exchange	Email systems are Microsoft Exchange with O365 via MS Cloud SaaS Solution
Tableau	Data lake reporting tools utilize Tableau reporting Software. Can consume data through API, Oracle database using ETL or file load.
EDM/Perceptive	Document/Workflow Management. Highland Perceptive System Version 7.4
8x8 Virtual Office	UCaaS System

- Please provide a current list of all prebuilt API integrations to third party solutions. Please also provide a list of integrations planned for the next 12 months.
- What are the preferred browsers that support your platform?
- Are there any browsers that do not support your platform or perform poorly?

## 6.0 Implementation Project Plan

- The provider will be responsible for (to be included in implementation project plan noted below):
  - Completing a Detailed Design
  - Conducting a Network Assessment of the VA529 Network
  - Establishing at least two paths of connectivity between the Provider Data Center and VA529
  - Training
  - Creating a test environment for integration testing
  - Providing and maintaining VA529s' fully functioning Business Continuity/Disaster Recovery environments
  - Providing go live support for each phase of implementation

- Please provide a sample implementation project plan including the following (along with the requirements stated earlier in this section):
  - Assigned Project Manager
  - Assumptions
  - Implementation Approach
  - Implementation Project Plan/Timeline, including milestones
  - Core Project Teams / Roles & Responsibilities (both provider and VA529)
  - Test plan
  - Minimum Technology Requirements
  
- What system acceptance criteria must be met before the system is available for VA529 for UAT?

## 7.0 Security/Compliance

The selected vendor must meet or exceed VA529 security requirements.

- The select vendor would be required to provide SOC reports that include but are not limited to:
  - Enterprise risk, security, and privacy overview. Please confirm.
  - Assurance of business continuity practices. Please confirm.
  - Assurance over product development life cycle. Please confirm.
  
- Present a Certification of Liability Insurance. Please confirm.
  
- The provider will be required to notify VA529 within 24 hours of any identified security breach within the solutions or exposure to critical information (e.g., PII). Please confirm.
  
- At a minimum, please describe how security is built into the system to identify, prevent, or provide the following:
  - Infrastructure-based attacks
  - Application-based attacks
  - Man-in-the middle (Eavesdropping)
  - Denial of Service (DOS)
  - Session hijacking
  - Identity impersonation
  - Pharming
  - Caller ID spoofing
  - Toll Fraud
  - Access to Call and Screen Recordings
  - Call Logs
  - Ability to match incoming call number with phone number of record
  - Ability to automatically generate a comment on the account that includes time, date, and phone number
  - Ability for incoming call numbers to be tied to common identifier to inform of account hold and analyze for fraud. (i.e., a single number that calls in to inquire about 20 different unrelated accounts)
  - Ability to integrate with voice identification verification service
  - Ability to maintain email records sent to customers using a common identifier

- Ability for call recordings for non-call center employees and escalated calls to be tied to common identifier
  - Search function for recordings to include common identifier, carrier, IP, other meta data for the call
  - Function to obtain samples of phone calls for quality control.
  - Feature that will transcribe a call
  - Ability to refer a call/recording to compliance/incident team via a dedicated queue or workflow
  - Ability to tie calls returned by the call center to the original incoming call.
  - Ability to blacklist phone numbers
- Provide completed/maintain the Cloud Security Alliance (CSA) questionnaire. Please confirm.
  - Will you be willing to participate in audit and security follow-ups including responding to additional questions, including an information security review?

## 8.0 Availability and Performance

- Please define the availability SLA – is it an aggregated number or separate numbers per module.
  - What is system SLA?
  - What is voice SLA?
  - What is email SLA?
- Please respond to the following:
  - Ability to monitor/report on system availability
  - Ability to monitor/report on system quality issues
  - Ability to monitor/report on system utilization
  - Ability to monitor/report on license activity/usage
  - Ability to monitor/report on phone line usage
  - Ability to alert VA529 about availability/performance issues in real-time

## 9.0 Ongoing Support/Maintenance

- The provider must make clear which portions of the CCaaS solution can be maintained by VA529 and what the provider will be responsible for.
- Please provide details on any maintenance processes that VA529 must perform (e.g., clearing caches, etc.).
- Please provide details regarding the ongoing maintenance and system administration that will be provided.
- Please describe how database and configuration back-ups are stored and recovered for call routing, voice messaging, automated attendants, IVR, agent/supervisor configurations, and reporting.

- Would a customer success manager/partner be assigned to our account? Please provide additional details of this role.

## 9.1 Support

- What channels are available for support?
- What are hours of operation?
- Describe how you classify issue severity levels
- Describe your escalation process from Tier 1, Tier 2, etc.
- Describe your ongoing support options/plans.
- Describe support SLAs.
- Can clients access reports and notifications from your support tracking system?
- Please provide the details of client support communities or centralized hubs that allow for interactions with peers regarding the provider's solutions.

## 9.2 Upgrades

- Describe the process for supporting software upgrades to the existing platform – minor releases, major releases, and bug fixes.
  - Provide details on the notification/communication process.
  - Provide details on the quality assurance and testing process.
  - Provide details on troubleshooting support.
  - Provide details on the migration process.
  - Provide details on the contingency/rollback process.
  - Are details and history of software upgrades available online?

## 10.0 Business Continuity/Disaster Recovery

- Does this solution subcontract with third party vendors for any primary platform/cloud services to be provided to VA529, if selected?
- Provider's solution must provide geo redundant data centers at the provider level. Please confirm.
- The solution architecture must include two methods to connect provider's data center to VA529 in an active/active configuration. Additionally, calls should remain active and not drop during a failover. Please confirm.
- If both network connections fail, the solutions should be able to continue to make 911 calls during a network or internet failure. Please confirm.

- If a site loses connectivity, all automated attendants will continue to be played and transferred to Voice Mail or held in Queue for the contact center. Please confirm.
- Calls unable to be answered onsite will be answered by Voice Mail which will allow staff to retrieve those messages via cell phone or after connectivity is restored. Please confirm.
- Please describe how VA529 can/cannot participate in testing process and annual drills and the time frame for addressing any technical or related issues identified during the testing process/annual drills.
- Please provide Pandemic protocol, including remote support, social isolation practices and other strategies to continue support and availability during a pandemic.
- Please provide your SLA's and if there are options for upgrading them.
- Please provide how you will provide reporting and communication of outages to VA529.
- Please describe how system incidents are tracked, classified, and reported, including resolution and escalation procedures.
- Please describe if support is provided by your firm or outsourced or supported by offshore companies.
- Please provide information on any system outage in the past 2 years which resulted in customer disruption of more than 30 minutes.
- Please describe how VA529 can access reports providing call details and average standard service levels.
- Please describe E911 functionality for both office and remote workers.
- Please provide a description of support services provided for transition of services at the end of service or other contract termination. Please also describe removal/return of VA529 information and data (including call recordings).

## 11.0 Pricing

The following provides the directions for completing the “Pricing Worksheet” (See RFP Appendix C Pricing Worksheet).

### VA529 CCaaS Sample Configuration

- **Price Component** – specific component being priced. VA529 has already populated many of the components. If any components are missing, please add them individually and complete all the required columns.
- **Quantity** - the quantity required for each component. VA529 has already populated several items which should not be changed. For those items that are not “Quantity” driven (e.g., Test Environment, One Time Costs, etc.) you may have to manually enter pricing information into the “Extended Pricing” cells (they are currently set up as formulas).
- **Unit Price - Required** - the unit price for each component.

- **Discounted Unit Price - Required** – the discounted unit price for each component.
- **Extended Discounted Unit Price** – automatically calculated.
- **Annualized Discounted Extended Unit Price** – automatically calculated.
- **Notes/Comments** – VA529 has provided some comments/notes to assist in clarifying specific items. Please add comments/notes where appropriate.

The vendor completing the “Pricing Worksheet” is responsible for assuring all formulas and calculations are working correctly.