

Unified Communications & Contact Center Solution

Request for Proposal – Questions & Answers

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Orange County Employees Retirement System (OCERS)

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Questions Submitted:

Question 1

In regards to RFP Answers being posted to website, how will this be done? What is the link and do we need to login?

Answer 1

All questions submitted will be compiled and the answers provided in a single document posted to OCERS public web RFP page in the same location as the RFP document. All questions and answers will be publicly viewable, but OCERS will not indicate what vendor submitted what question.

Question 2

Instead of providing hard copies through the mail, can vendors submit RFP proposals electronic through email as a Word or PDF document?

Answer 2

Yes, OCERS will accept electronic submission of your proposals and supporting materials for this RFP. Please email them to Jenny Sadoski at jsadoski@ocers.org

Question 3

For the basic security portions, can we provide copies of our SOC1 & SOC2 reports? Is it necessary to know our annual budget for IT Security and compliance over the past 5 years and what percentage of our annual budget? Some vendors may not have easy access to this information for the purpose of providing it along with the RFP proposal.

Answer 3

For the procurement process OCERS does want copies of SOC1 and SOC2 reports. The annual budget information is optional, but it is too a vendor's benefit to provide as much information as possible in this area.

Question 4

Can FISMA and HIPAA guidelines cover questions in Data security? Example When data is purged or destroyed how is it done? This does follow the guidelines that are approved by government agencies but I don't know the exact process here.

Answer 4

Please provide proof that your organization follows FISMA and/or HIPAA guidelines in address areas of Data Security.

Question 5

Do you need to know specifically how we conduct and assess physical security? How much cyber-security insurance we have?

Answer 5

It is too a vendor's benefit to provide as much information as possible in this area.

Question 6

What is Prime Line Select?

Answer 6

A configurable system parameter that specifies whether the primary line on an IP Phone is chosen when a user goes off-hook. If it is, this becomes the active line and the phone will not automatically answer an inbound call on a second line, if the user is already on a call. This functionality varies by solution and is not a required feature.

Question 7

You mentioned that 3k-5k total monthly calls supporting active and retired members. How many total inbound vs outbound minutes are being used per month?

Answer 7

- Average monthly inbound total minutes = 25,000 minutes used
- Average monthly outbound total minutes = 15,000 minutes used

Reflects total calls, not just call to/from active and retired members*

Question 8

What is the average number of faxed pages per month?

Answer 8

We don't have a count for the number of faxed pages per month, but we can say that we have approximately 800 incoming faxes per year (70/mo.) and 2000 outgoing faxes per year (170/mo.)

Question 9

The RFP specifies the number of seats being 100 employees in total for UC licenses but also having 130 hard phones. Are you looking to reduce the 130 total hard phones with a mobile/desktop app or are you still requiring a specific number of hard phones for certain employees?

Answer 9

We would like to lease 130 hard phones to pre-seat each office/cubicle located at our Headquarters.

Question 10

The RFP indicates 54 licenses are contact center focused. Are the 8-10 customer support admins part of those 54 seats or in addition to? i.e Contact Center users and admins totaling 62-64 seats

Answer 10

We will have 54 total users needing contact center licenses. Of the 54 users, 8-10 users are supervisors/managers who will need to administer the system, have access to reports and enhanced functionality, depending on the solution you are proposing.

Question 11

What CRM is being utilized for support and sales teams? i.e Salesforce, Zendesk, ServiceNow, etc.

Answer 11

We don't not currently employ a CRM solution for the purposes of this RFP. Future integration might come into play within the next 3 to 5 year.

Question 12

What productivity suite are you currently using? i.e Gmail/G Suite or Microsoft Office 365?

Answer 12

Currently using Microsoft Exchange/Outlook 2016 with plans to migrate to Microsoft Office 365 in 2019-2020

Question 13

Are you only considering hosted solutions?

Answer 13

OCERS preference is to seek a hosted solution.

Question 14

Is there a specific reason you are looking to replace the existing hosted solution? Have you been having any issues we should be aware of?

Answer 14

We are looking to change vendors based on the direction of OCERS Board of Retirement.

Question 15

Are there any analog faxes that you will also need connected across the hosted connection, or will they all be fax to desktop. If there is a need for analog, how many if needed through our solution?

Answer 15

Yes, there may be 3-5 analog faxes needed for Business Continuity purposes.

Question 16

Is your current provider providing a direct connection to their data center (a private circuit connection) or are you using your own internet connection only. How many, and what type of connection do you have and what is the speed?

Answer 16

Current connect through own internet connection only using a 100Mbps pipe.

Question 17

Do you want the UCaaS (PBX) vendor to also provide the CCaaS (Contact Center) service as a single billed and service provided entity or are you willing to consider separate UCaaS and CCaaS providers? For example, there is an extremely reliable UCAAS provider that partners with a CCAS provider that specialize in the contact center only. Would you consider having 2 providers if providing the best overall solution?

Answer 17

Our preference is to use a single provider, but we will consider all options

Question 18

Can you provide actual sample reports so we are sure the solution we provide meets your reporting needs?

Answer 18

No sample reports are available. Please see Appendix C for list of desired reports and examples of information we would like to see on Key reports.

Question 19

Other than the callback requests, is there a need to run outbound automated call distribution campaigns? Answer 18

Answer 19

Not at this time, but the functionality would be nice to have as an option.

Question 20

Is there a need to connect to any type of database to validate a caller's identification, or to allow for an automated information look up? If so, what is the database type that information resides in? (AS400, or other?)

Answer 20

Not at this time, but we would like to eventually see if we could integrate with various CRM platforms leveraging SQL, Oracle and other database types.

Question 21

Do you route anything other than voice calls into the contact center (e.g., email, web chat, social media mentions?)

Answer 21

Not at this time.

Question 22

Will you require the aforementioned media types (email, web chat, social media mentions) to be routed to the contact center staff in the future?

Answer 22

We'd like to explore our options in these areas, but they are not required at this time.

Question 23

Are all 54 contact center staff always simultaneously logged in? If not, what is the maximum number of simultaneously logged in agents at max capacity?

Answer 23

We average 10 – 15 contact center users logged in simultaneously during peak season. Less than 10 during non-peak season.

Question 24

You list 100 concurrent users, but 130 leased IP phones. What are the extra 30 phones used for? (e.g., are those phones that will require a mailbox, desktop /mobile client, and other features, or are they for dial tone only?)

Answer 24

We have IP Phones staged in each available office and cubicle.

Question 25

Would you consider having the phones part of the monthly hosted cost, or would you like a purchase price(as well as leasing options) for the phones outside of the UCAAS?

Answer 25

We are interested in leasing phones, but would like to know the purchase cost for comparison.

Question 26

What is the exact number of conference room phones you want vendors to propose?

Answer 26

Ten (10) conference room phones

Question 27

What is the exact number of supervisor licenses that you want vendors to propose?

Answer 27

Ten (10) Supervisor licenses

Question 28

Do the Supervisors also take inbound voice and/or media requests like the agents, or do they ONLY supervise?

Answer 28

Primarily to supervise, but need to be able to take calls during peak seasons, or in case of emergency (business continuity purposes)

Question 29

How does OCERS currently use bridged call appearances? If they are not used now, will there be a future need for bridged call appearances?

Answer 29

OCERS does not currently use bridged call appearances, but it is a feature we are interested in.