Request for Information (RFI)
On
IP Call Centers

RSVP Deadline: E-mailed or postmarked by **March 1, 2005** 5 p.m. (EST)
RFI Deadline: Emailed or postmarked by **March 18**, **2005** 5 p.m. (EST)
***Publication Date**: June 9, 2005*

I. Introduction

Network Computing's **June 9, 2005** cover package will be devoted to IP Call Centers. Why should an enterprise implement an IP call center, and what is the best path to upgrade from a call center using a traditional TDM (Time Division Multiplexing)-based PBX? The RFI is based on a fictitious enterprise in the consumer electronics industry with 250 call agents in sales and technical support.

If you would like to participate, please RSVP to the author, Michael J. DeMaria (mdemaria@nwc.com) by **March 1, 2005** and **return the completed RFI** to Michael **by March 18, 2005.**

A. Purpose

This Request for Information is proprietary to Network Computing and CMP Media, LLC. It is drafted and disseminated for the sole purpose of generating information on call center products for publication in Network Computing on June 9, 2005. Participating vendors must meet the minimum requirements for participation described in Section B and agree that any information returned to Network Computing in response to this RFI will be published in print and electronic form on our Web site, www.networkcomputing.com.

Please note that we reserve the right to examine a test unit in our Syracuse University Lab or at a customer site for any product submitted for review.

B. Instructions

The following minimum product requirements are necessary to participate in this review of **Call Center** applications. Please check all that apply.

__X__ Product is available to customers on or after March 18, 2005 and is not in beta form
__X__ Support for both TDM (circuit) and IP (packet) switched voice networks
__X__ Multimedia routing for voice, e-mail, Web, and facsimile communications
__X__ Call blending: support inbound and outbound calling
__X__ Look-ahead routing logic (interrogate queues and estimate call-wait time)
__X__ Priority queuing
__X__ Queue escalation

_X__ Skills-based routing

If you do not meet all of these criteria, your product does not meet the minimum qualifications for this review. Please notify Michael J. DeMaria (mdemaria@nwc.com or 315-443-5798) by March 1, 2005 that you do not meet the criteria for participation. Thank you for your consideration.

If you respond to the RFI, please note the dates in Section C to complete the RFI on time for inclusion in our June 9, 2005 issue. We suggest you read through the entire RFI before answering questions. You can reference answers to other questions in the RFI using the section and question number. Please do not reference materials outside the RFI; incorporate them into your answers. This RFI will be the **only** source used to review your product.

Some questions provide for Yes/No checkbox answers, while some require more detail using an essay format. **Essay-type questions include word-count limits. Any responses submitted beyond the limit may be disqualified**.

Please answer all questions--this information is the foundation on which we determine the winning bid and our Editor's Choice Award. If you do not have an answer for a question or it does not apply, please indicate that in the space allotted. If you leave a question blank, we can only assume that your product does not support the proposition or that it does not provide an answer to the question.

C. Effective Dates

RFI Issue Date: February 25, 2005
RSVP Deadline: March 1, 2005 by e-mail to mdemaria@nw.com by 5 p.m. (EST),
RFI Deadline: March 18, 2005 postmarked or emailed by 5 p.m. (EST)
Publication Date: June 9, 2005

II. Business Overview

Kodiak Corporation is a global manufacturer of thermal management solutions for computers. It produces fans, heat sinks, and temperature sensors for PC manufacturers worldwide. It also produces CoolIT, a line of water-cooled workstations and mid-range computers. Kodiak aims to put its thermal technology in every PC on the planet and expand the CoolIT line from its niche market in computer gaming and engineering to enterprise desktops and data centers.

Customers contact Kodiak today using phone, fax, e-mail, and the Web. Each of these methods is independent of the others. The Kodiak Board of Directors has identified this as a problem and a road block to global domination in thermal management. It aims to resolve the problem by establishing an IP Call Center capable of routing multimedia (voice, e-mail, fax, and Web) communications to the call center over IP. However, it is not ready to forklift out its current phone system for a VoIP system and thus lose its investment in its legacy TDM (Time Division Multiplexing)-based PBX.

Kodiak's manufacturing, testing, and support facilities are located in Death Valley, California. Customer sales and service outlets are in Los Angeles and San Francisco. Presently, calls come into both the Los Angeles and San Francisco offices and get routed to sales and service specialists in those facilities. All support calls are blind forwards to Death Valley.

PSTN trunks with ANI (Automatic Number Identification) services connect to TDM-based PBXes in Los Angeles and San Francisco. The PBXes are connected via ISDN lines. Automatic Call Distributors (ACDs) and Integrated Voice Response (IVR) systems in both locations provide front-end voice processing and switching as well as a self-service customer response system. In addition, the redundant systems act as a hot back-up in case one fails.

Calls are routed based on the menu selection for the particular service desired or employee extension and the calling number. A local number receives a lower priority than a long-distance number to reduce the calling party's cost of inquiry.

Kodiak's current system employs *call-back messaging.* This enables customers to register their number with the system to receive a call back if the wait-time is extensive. For the call back, Kodiak uses *call blending* to serve both incoming and outgoing agent calls through a predictive dialer. The system monitors the status of incoming calls and the availability of agents and allows outgoing calls only when it determines that an agent is free and that an outbound call will not adversely affect incoming calls.

Support calls are routed from Los Angeles and San Francisco to Death Valley back over the PSTN. Over the past year, the Death Valley office has piloted a number of VoIP initiatives to take advantage of data trunks (T-1) running between each of the offices. But no decision has been made at this time. A detailed RFP for a VoIP system in Death Valley is in progress and implementation is projected for Q4 2005. But Kodiak has no information on the projected implementation in this RFI.

Each of the call centers in Los Angeles and San Francisco support approximately 100 agents (total = 200). During peak sales periods (November-December), Kodiak adds 50 seasonal agents to each location (total = 300). This is a heavy burden on the physical plant but necessary to handle seasonal call volume. Kodiak would look forward to setting up agents outside of the enterprise in home offices or scope out a partner to outsource seasonal contact center agents (segue to an outsource sidebar).

III. Kodiak Business Essentials

A. Employees: 1,500
B. Call agents, regular, FTE (Full-Time Equivalent) employees: 200
C. Call agents, irregular, seasonal employees: 100
D. Number of agents working remotely: 0 now, but desire 100 post implementation.
Existing network infrastructure: The data network at each site sports a Gigabit backbone with 100 Mbps connections to desktops. IEEE 802.3af (Power over Ethernet) is available on desktops and QoS strategies include IEEE 802p/q (Managed Objects) and support for either DiffServ (Differentiated Services) or ToS (Type of Service). All corporate data are contained in Active Directory, file stores, and MS-SQL and Exchange databases that are replicated across each site. Web and e-commerce sites are centralized in San Francisco. Fax servers are located in all three locations. With these facts, assume that the network is more than adequate to support VoIP applications.

IV. Kodiak Goals

A. Improve call center operations
B. Provide excellent customer service
C. Reduce telecommunication costs

V. Kodiak Business Objectives

A. Invest in a new call center platform that integrates with the current (legacy) platform, enabling Kodiak to maintain its investment in a TDM-based system while providing a smooth migration path to a VoIP infrastructure.
B. Use multimedia routing to send all inquiries to call center agents, whether they come in by voice, fax, e-mail, or Web,.
C. Decrease costs by supporting voice and data on a single network
D. Eliminate toll charges between sites

E. Reduce infrastructure costs by enabling agents to work remotely

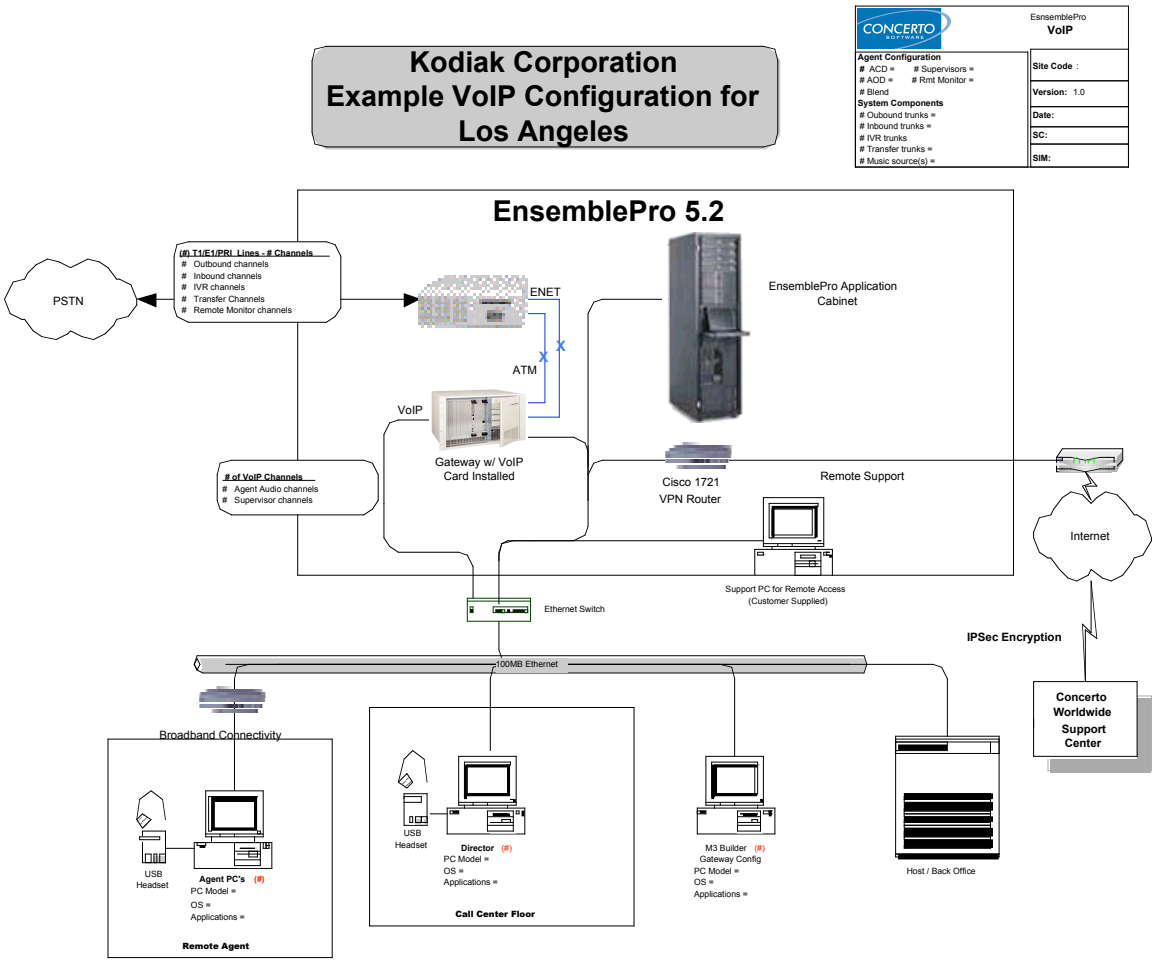
VI. Review Criteria

The proposed solutions will be graded on the following criteria:

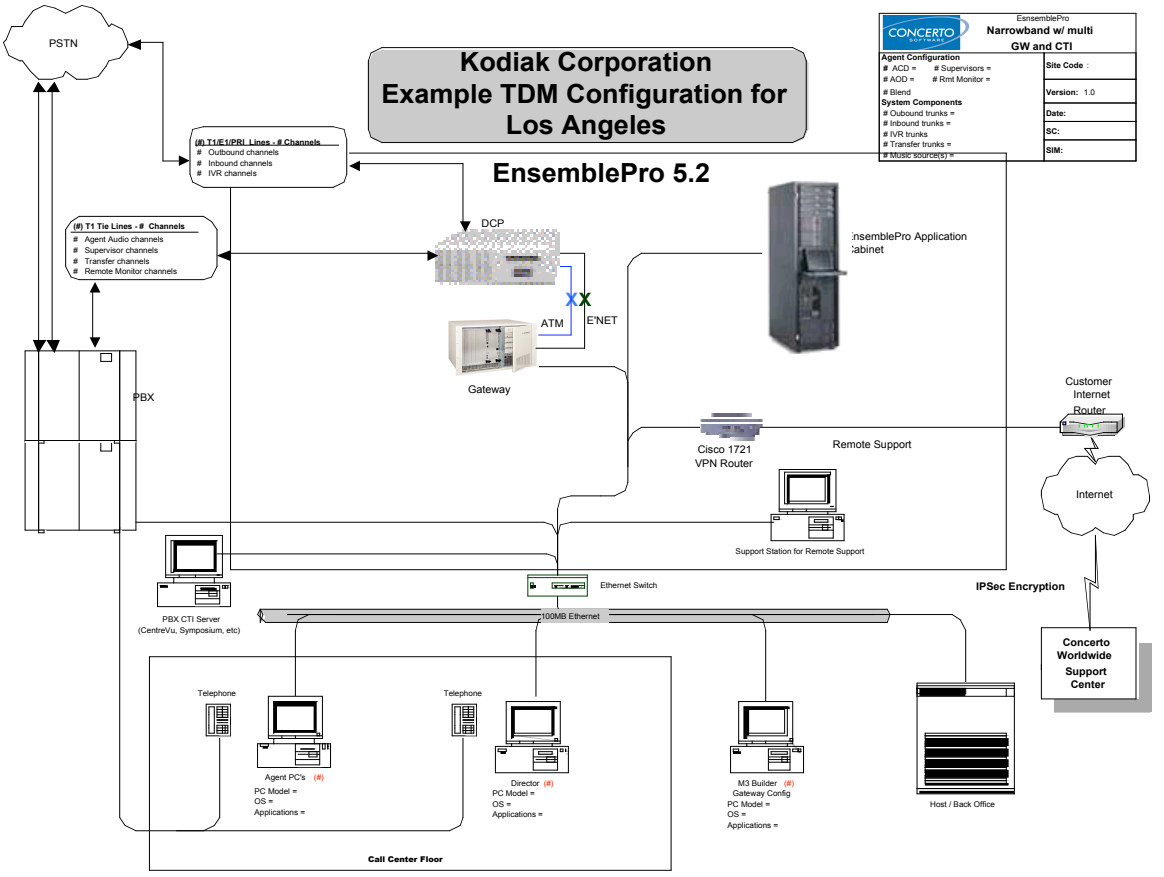
A. General Architecture

1. Provide a diagram of major hardware and software components and how they are interrelated and interconnected.

The first diagram represents an EnsemblePro 5.2 system deployed with VoIP agents.



The second diagram represents an EnsemblePro 5.2 system deployed in the initial environment at Kodiak where the legacy TDM infrastructure is retained.



2. Provide the business case for your solution based on Kodiak's goals, objectives, and business environment. You are free to include a competitive analysis. Please limit your answer to 500 words or fewer.

Concerto EnsemblePro offers a complete inbound, outbound and blended multi-channel contact center solution (voice, email, web and fax) that includes robust workforce management, queuing, routing, reporting and agent empowerment capabilities – enabling you to:

- Secure customer relationships while meeting compliance regulations
- Empower your employees to deliver on your brand promise
- Maximize every relationship
- Seize every opportunity for customer acquisition
- Increase profitability by optimizing the efficiencies of your systems and people

Concerto EnsemblePro:

- Is a unified contact center solution (designed and built from the ground up), delivering advanced multi-channel contact capabilities
- Provides contact center agents with access to real-time information on customer history and preferences, increasing up-sell and cross-sell opportunities
- Is built upon three decades of experience and unmatched insight in the industry
- Leverages existing infrastructure by integrating seamlessly to provide unified functionality, regardless of the underlying telephony deployed
- Provides universal queuing, real-time monitoring and historical reporting in a single unified platform
- Is able to implement a single set of business rules that can be applied across all interaction channels
- Generates unified reports for all contact center activities and manages the entire center from one central point of administration

- Allows customers to take advantage of VoIP in their contact centers, by connecting remote agents or multiple sites via IP – your technology in one place and your agents in another – leveraging either traditional or IP-based telephony, all at a pace that suits you.

Concerto EnsemblePro delivers a wide range of applications to empower agents, speed response time, and take your customer service to a new level. These include:

- Automatic Call Distribution (ACD)
- Automatic Outbound Dialing (AOD)
- Automatic Workflow Distribution
- Computer Telephony Integration (CTI)
- Email Management
- Fax Management
- Interactive Voice Response (IVR)
- Multi Media Manager
- Voice Mail
- Voice over IP
- Web Callback
- Web Chat
- Web Collaboration
- Recording and Monitoring

Concerto EnsemblePro helps you increase agent productivity and effectiveness – ultimately, improving customer satisfaction and enhancing sales opportunities. With Concerto EnsemblePro, you enable your agents to handle all types of customer interactions, and you can deploy any or all of your agent population as fully blended agents to suit your business needs, optimizing your staffing levels and minimizing idle time. Inclusive applications automate the work process for agents, including:

- Predictive dialing
- Email response (auto and assisted)
- Coordinated voice and data transfers
- Screen pop
- Skills-based routing
- Quality monitoring
- Recording
- Back-end data access
- Dynamic provisioning

B. Routing
(business rules used to process and prioritize call center transactions)

1. Describe the business rules available to Kodiak to route multimedia messages to contact center agents. Limit your answer to 500 words.

EnsemblePro offers two methods of routing. First, a contact is handled by a multi media manager rule. This rule utilizes information from the contact (e.g., ANI), system configuration information, back office application information, and other critical information to determine how to treat the contact. For example, for voice calls this could be routing to a queue, routing to a specific agent, sending the call to an IVR script, or playing the contact a personalized message. The rules will determine the best way to treat the contact and the best queue or agent to handle the contact. Once the contact goes into a queue, then there are routing rules within the queue for getting the contact to the right agent.

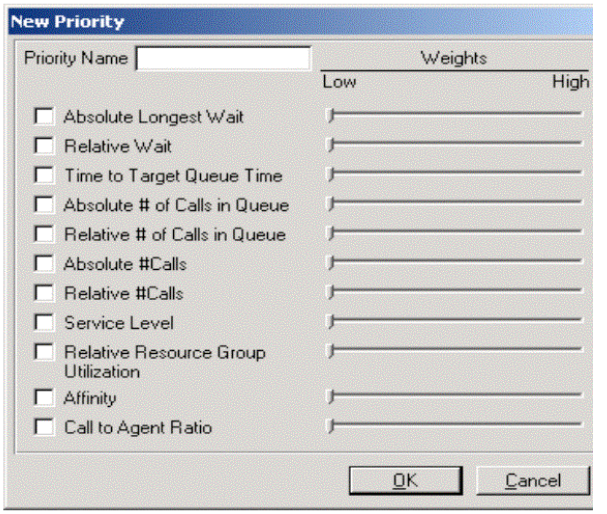
Multimedia messages are queued by the same routing engine as voice calls and are treated as such. Simple routing based on the receiving email address can be enhanced through the use of the multimedia manager. Powerful scripting can scan for key words or data to determine the best route for an individual contact. Any information that can be isolated by Natural Language Processing (NLP) or Boolean logic can be used to determine the route. This information could be the sender's address, ANI, account number, or key words like unhappy or upset. Once the correct queue is determined, the available agent with the best skills can be selected for delivery. Agents can blend seamlessly between inbound and outbound voice, chat, email, fax, and workflow tasks. Additionally the script could check if an agent is available or queue lengths are excessive and reroute the call to a voicemail box or another location if needed.

2. Are there any differences between routing customer contacts over e-mail, fax, telephone, and the Web? In other words, do business rules (routing) apply to all multimedia contacts equally? If yes, please explain in 300 words or fewer.
EnsemblePro utilizes universal queuing capabilities to route all types of contacts.
All incoming contacts have the same business rules applied to them, regardless of the media used.

Among the many routing options available within a queue are:

- ***Priority Routing*** - A method of routing where contact types are assigned priorities or weight levels. When calls are in queue and an agent becomes available, the contact with the highest priority will be routed to the agent.

- ***Skills-Based Routing*** - A method of first routing contacts to agents that possess the most adequate set of skills, based on the skill requirements for the service. Concerto Software has a powerful, patent-pending method for skills-based routing. Each agent has an individual skill profile spanning all channels of interaction. Each service has its own skill requirements, and each interaction is precisely routed to the individual agent with the best skill match. Call center managers can create an unlimited number of skills and define proficiency levels for each skill. New skills are created in seconds.



- ***Circular Routing –*** A method in which contacts are routed to the agents in sequence. In other words, the first agent receives a contact, then the next, etc.

- ***Terminal Routing –*** A method in which contacts are routed always starting with the agents at the top of the list. This type of routing can be used as a substitute to skills-based routing, since the more highly skilled agents can be placed at the top of the queue and always receive the contact first.

- ***Longest Idle Routing –*** A method of routing contacts to agents in which the agent that has been idle for the longest period of time receives the next contact (regardless of his or her place in the agent queue).

3. Can Kodiak share the same business rules across all sites?
Business rules can be the same for all sites or can be customized to local requirements.

4. Describe the difficulty and the tools necessary to make routing changes on a production system. Use 300 words or fewer.
Depending on the type of routing, the change might be something as simple as updating the operating hours in a schedule or adding an overflow queue at the second site. All configuration tasks are accomplished through the use of a combination of the Director (supervisor's GUI), the multimedia manager, and the gateway configurator tool (trunks and telephony). These graphical interfaces are designed to be easy to learn and use with a goal of being intuitive to remember for less frequent tasks. Specifically the task of changing business rules while leaving the configuration static (not reconfiguring trunk groups for example) is achieved in a single graphical work flow editing environment common across all contact types. Basic supervisor training of four days is sufficient for the vast majority of users. Additional classes of 3 and 2 days are

recommended for individuals who use the multimedia manager or gateway configurator for more complex routing and trunk configuration.

5. Are carrier-based pre-call routing options necessary to implement your solution? If so, please detail the routing required by carriers and which carriers are certified for your product. Limit your answer to 250 words.
EnsemblePro can co-exist in a pre-call routing environment. Information transmitted as ANI, DNIS, or collected data in a UUI field can further enhance the on-site routing done by EnsemblePro. However, pre-call routing is not required.

6. When real-time response is indicted by voice and Web contacts, describe the system's ability to inform customers of their positions in the queue and the time remaining before a response? Limit your answer to 250 words.
EnsemblePro tracks hold times in queue which can be played to a customer on hold.

C. Queuing
(prioritization of routed contacts)

1. Can the system check the status of a queue prior to routing? Y/N
Yes

3. Can the system reroute contacts for changed circumstances, such as queue availability? Y/N
Yes

4. Can agents be interrupted from a current task to handle high-priority contacts? Y/N
An agent engaged in a call cannot be interrupted by EnsemblePro. EnsemblePro does allow for agents to engage in other tasks between system-delivered contacts. For instance, a low-volume, high priority queue for your best customers could be served by a small group of agents whose primary tasks are not call related. The agents would be notified by a whisper message and screen delivery of the incoming call (or email, chat, etc.) If the agent is assigned to multiple queues managed by EnsemblePro, priority plans can be used to ensure rapid delivery of the most important calls ahead of less important ones.

5. Can contacts select an IVR self-service module and return to their place in the queue to talk with a Kodiak customer service, sales, or support agent? Y/N

EnsemblePro allows for customers to select a transfer to an IVR service. It does not hold the callers place in queue. EnsemblePro can use the scripting of the multimedia manager to either return the user to a higher priority queue or write the caller's information to an external database table which can be trickled to a high priority outbound service for call backs. This has much the same effect as holding place in queue, plus it offers the option for the customer to leave a different call back number and desired callback time.

D. Enterprise Integration

1. List the TDM-based PBX switches you support by vendor and model.
For standard telephony connectivity, any PBX supporting standard T1 and/or ISDN protocols are supported. Concerto specifically tests against the following PBXs for both telephony integration and CTI link blended inter-working.

Avaya Definity and MultiVantage
Nortel Meridian & Succession
Siemens HiCom300E
Cisco IPCC

2. List the IP PBX switches you support by vendor and model.
Concerto supports SIP 2 and TDM-to-IP Gateway connectivity to an IP PBX.

Avaya Definity
Cisco IPCC
SNOM

3. List the ACD (Automatic Call Distribution) systems supported by vendor and model.
For standard telephony connectivity, any ACD supporting standard T1 and/or ISDN protocols are supported. Concerto specifically tests against the following PBXs for both telephony integration and CTI link blended inter-working.

Avaya G3
Nortel Succession
Siemens HiCom300E
Aspect Call Center
Cisco IPCC

4. List the IVR (Integrated Voice Response) systems supported by vendor and model.

Concerto includes an IVR as a fully integrated product component.
Concerto also connects to IVRs from multiple other vendors via an API or via ISDN data and a professional services engagement.

5. If you supply your own IP PBX, what features are supported? Check all that apply.
Concerto does not supply an IP PBX
__Authorization codes
__Automatic callback
__Add-on conference
__Call waiting
__Paging
__Hoteling
__Automatic camp-on
__Automatic alternate routing
__Trunk callback queuing
__Uniform dial plan
__Night service
__E911 Support
__Class of service
__Class of restriction
__Intercom groups
__Group paging
__Directed call pickup
__Group call pickup
__Distinctive ring

6. List the VoIP gateways that you support by vendor and model. Include the signaling protocol supported with each model (e.g., H.323, SIP).
Concerto supports native VoIP agent connectivity with SIP 2, G729a, and G711. In addition, Concerto has the ability to leverage TDM to IP Gateways. Examples of common gateways such as Nortel Passport, Cisco IP Gateway and Alcatel IP Gateway have been successfully deployed with EnsemblePro.

7. If you manufacture and sell your own VoIP gateway, provide the business case for it in light of Kodiak's goals and objectives in 300 words or fewer.
Concerto supports native VoIP agent connectivity with SIP 2, G729a, and G711. Concerto does not manufacture an IP gateway.

8. Does your solution certify or support integration with major messaging and/or collaboration packages? If yes, please select all the packages that apply.

___ No (answer question 10)
__X_ Yes, the following packages are supported:
___IBM Domino/Notes
_X_MS-Exchange/Outlook
___Novell Groupwise
_X_Other (Please specify) – any POP3 or IMAP compliant email client or server.

9. **If you answered "No" to Question 8**, what options are available to integrate an enterprise messaging and/or collaboration tool with the contact center? **Limit your answer to 300 words.**
Concerto's Media Server leverages industry standard connectivity to work directly with the corporate web server for chat and collaboration capacity (please see question 12 for supported web server platforms).

10. Does your solution certify or support integration with fax server packages? If so, please select all the packages that apply.

___ No (answer question 11)
_X__ Yes, the following packages are supported:
___ Biscom
_X_ Captaris RightFax
___ Castelle
___CopiaFacts International
___ Esker Fax
___ Faxback
___ Faxcore
___GFI Fax
___ Interstar
___ Omtool
___ Softlinx
___ Other (Please specify)

11. If you answered **"No" to question 10,** what options are available to integrate an enterprise fax service with the contact center. **Limit your answer to 300 words.**
EnsemblePro has an API to deliver workflow to external systems which include fax servers. Integration with other 3rd party fax servers is a professional services engagement.

12. Does your solution certify or support integration with Web servers? If so, please select all the servers that apply.

___ No
_X_ Yes. The following servers are supported:
_X _ Apache
__X _ MS-Internet Information Services
___ Sun Java Enterprise System
___ Zeus
___ Other (Please specify)

13. If you answered **"No" to question 12,** what options are available to integrate Web serves with the contact center? **Limit your answer to 300 words.**

14. Is there a separate code base and/or point of administration for the support of outbound calls to satisfy the "blended calling" requirement? Or is it fully integrated with the system?
Outbound calling and call administration is fully integrated. Support for contacts of all types is managed through a single unified queuing engine, which offers priority based routing of all interactions (ACD, Predictive Dialing, Chat, Email, Workflow, and external CTI). The

administration is through a single Director application which is a user-friendly, GUI-based application targeted at the call center supervisor and system administrator.

15. What operating system software is supported? Check all that apply.

___ Linux
_X_ MS-Windows
___ UNIX (this includes AIX, BSD, HP-UX, Solaris, etc.)
___ Other (Please specify)

16. What relational (or other) database is supported? Check all that apply.
Concerto supports any ODBC compliant databases for data exchange. Concerto is an application that runs on Sybase. The Concerto application handles all database maintenance for the internal Sybase database and does not require end users access for this activity. All Sybase database settings are handled through Concerto user interface.

Concerto supports ODBC connectivity to the following dbases.
_ X _ IBM DB2
_ X _ MS-Access
_ X _ MS-SQL
_ X _ MySQL
_ X _ Oracle
_ X _ Postgres
_ X _ Other (Please specify) Any ODBC or JDBC compliant dbase

17. Is the database included with the call center or does the customer supply it? Check the appropriate response.
Sybase is supplied with the system as an OEM component by Concerto. External databases are the customer's responsibility.
_ X _ Included in the call center application
_ X _ Supplied by the customer

18. Do you have connectors or established integration paths for back-end systems? Please check all that apply?

Concerto offers a wide arrangement of back-end and front-end connectors.

To handle outbound calling list management, Concerto supports Microsoft Explorer based file import/export tools for manual file management as well as scheduled download/uploads via an automated process.

The Concerto Multi-Media Manager (workflow manager for IVR that handles Voice, Email, and Chat self services) supports ODBC, XML, and an IVR hook to external applications.

Concerto's LYRICall Agent interface is a browser based workflow and scripting package that supports integration to back-end and front-end applications via ODBC, JDBC and standard Active X development.

Concerto's AgentOCX Agent connector is commonly used for desktop integrations with all popular 3rd party CRM and other common contact center desktop applications.

___ E.piphany
___ Oracle and Peoplesoft
___ SAP
_X_ Other (Please specify)

19. What tools are used to administer the system? Check all that apply.

___ CLI (Command Line Interface)
_X_ GUI (Graphical User Interface) 32-bit binary application
___ GUI 64-bit binary application
_X_ Web-based administration
___ Other. (Please specify)

20. Do you supply a developer's tool kit with the call center?
___ No
___ Yes, gratis
_X_ Yes, at cost of: It varies by API / connector with a per API / connector charges that range from $500 to $10000.

E. Computer Telephony Integration (CTI)

1. Describe the call center's integration with voice and data to attach data to call events. **Limit your answer to 300 words.**

EnsemblePro offers a rich set of interfaces to retrieve and attach data to contact events. The data delivered with the event such as DNIS, ANI, Email address, etc. are captured with the event and are available throughout the life of the contact to the business rules, reporting, as well as the agent. The self service engine is capable of retrieving data from an external data-source via multiple APIs (ODBC, JDBC, host emulation, TCP/IP, and XML) in order to service a contact's needs. Additionally the LYRICall agent desktop has the ability to integrate with multiple back-end databases and provide the data to the agent in a single user interface

2. Describe how the call center application integrates with agent desktops for efficient customer account management. For example, does the CTI component have application programming interfaces (APIs) to applications, or will custom development be necessary? **Limit your answer to 300 words and include a graphic of the desktop if applicable.**

Concerto offers three agent desktop solutions for softphone and screen pop.

Agent Toolbar – Agent Toolbar is thick client solution that runs on all agent desktops. It has a softphone tool bar for all telephony events (hold, dial, transfer, etc.). The toolbar provides agent screen pops for inbound, outbound, email, chat, workforce automation, Fax, and CTI data from an external PBX/ACD. The toolbar includes a complete set of APIs to support industry standard for cut-&-paste capability to a back-end application.

Agent API – Is a set of ActiveX APIs for customers that have an existing agent desktop and wish to incorporate the toolbar and data screen pop into their existing application.

LYRICall – LYRICall is a browser based agent desktop that provides workflow and logical branch scripting. LYRICall has the ability to integrate with multiple back-end databases and provide the data to the agent in a single user interface.

3. List business applications that will integrate with your system, along with a brief summary.

Concerto has experience integrating with all of the leading business application vendors. This includes CRM, ERP, Mainframe applications, and customer business process based applications such as Collections, Marketing, Sales, and Service. Examples of these applications include Siebel, SAP, PeopleSoft, Oracle, Remedy, Microsoft, FDR, Total Systems, AMS, Fidelity, CUBS, etc.

4. List software vendors not mentioned above, in question 3, with which you have established partnerships.

5. Provide additional comments about the current or planned business value of support for third-party integration. **Limit response to 100 words.**

Concerto continues to expand the third-party integration tools available with EnsemblePro. Concerto is presently working on new XML / SOAP standard tools enabling our customers to leverage the latest technology for agent, back office, and workflow connectivity. This new broker layer will allow CRM, back office, and business process vendors to tightly integrate their workflow, data, desktop, and softphone functions with EnsemblePro.

6. Describe how agents are alerted to incoming e-mail, fax, and Web messages on their desktops. For example, does a screen pop up, or does the agent have to toggle to another application to observe a queue? **Limit your answer to 250 words. You have the option to include a graphic of the desktop integration.**

Concerto alerts the agent of new interaction (inbound, outbound, email, chat, workflow, fax, blending with external PBX/ACD) via the system screen pop. The screen pop is easily customized for all types of interaction and does not require the agent to toggle to another application to observer the queue. Based on the interaction type, contact data, and business rules the screen pop may also initiate a scripted application and/or connect to external data-sources to provide the agent with the information necessary to handle the transaction.

7. Describe how Web interactions and real-time support for chat sessions get routed to agents in their different locations. Is the same routing routine applicable to all the Kodiak sites?

Concerto utilizes a single routing engine for all interactions (inbound, outbound, email, chat, workflow, fax, blending with external PBX/ACD) and these rules may be common across sites. When the customer selects Web Chat on your corporate web page, the EnsemblePro Media server instructs the web server to present the customer with a chat window. EnsemblePro may send an automatic greeting message to the customer along with using the Multi-Media Manager to self-service the chat customer. If an agent is required, Concerto utilizes its unified rules engine for prioritization of the chat customer and connects the customer to the agent. Once the chat session is established, the customer and agent can co-web browse and chat. In addition, the customer can select the call me button and the agent will automatically place an outbound call to the customer in order to close the issue or sale.

8. What standards are supported for CTI? Check all that apply.

_X_ CSTA (Computer-Supported Telephony Application)
___ H.323
_X_ HTML
_X_ MVIP (Multi-Vendor Integration Protocol)
_X_ SIP (Session Initiation Protocol)
_X_ TAPI (Telephone Application Programming Interface)
_X_ TSAPI (Telephone Services API)
___ VoiceXML
_X_ XML
___ Other (Please specify)

F. Telecommuting

Kodiak would like to give call center employees who live in the Bay area and in Los Angeles basin the option to telecommute from home via their broadband connections. The company wants to provide the flexibility for those in the call center to be able to work from home in a seamless manner. There will also be 50 additional telecommuters hired on a seasonal basis. Provide

details on what the telecommuting strategy will be for Kodiak after they implement the IP Contact Center.

1. Provide name of telecommuting product:
EnsemblePro does not require a 3rd party product to offer telecommuting. The LYRICall agnet desktop is a web-based application that along with Concerto's VoIP agent connectivity option, provides a seamless and consistent experience for both in contact center and home based agents. The agent's existing analog connection to the PSTN could also be utilized for the voice connectivity if Kodiak desired a phased implementation of VoIP.

2. Provide per employee price for telecommuting product:
There is no cost differential between a home based and an in contact center based VoIP agent.

3. Provide a diagram of your proposed telecommuting solution.
Please refer to the first diagram in Section A question 1.

4. Describe how you provide the telecommuter solution in a secure, functional environment. **Limit response to 150 words.**

Concerto support for telecommuting requires an agent voice and data path. This can be provided via a broadband link to the agent's location. To limit toll call expenses, VoIP could be used for audio via a SIP phone or soft-phone at the agent's location. VoIP cards are one of several options for the agent audio path. Use of off the shelf VPN technology available from other vendors could be utilized to secure the connection and Concerto would be pleased to work with Kodiak to determine the proper configuration of the chosen security infrastructure to ensure trouble free operation of the remote agent.

G. Scalability

Kodiak recognizes that there physical limitations to everything--even their heat sinks. Share the physical limits to your call center below. If a limit does not apply to your solution or business model, please state that and tell us why **in 50 words or less**.

1. What is the maximum number of call agent seats/licenses per active system?
Currently the maximum number of agents per system is 900.

2. What is the maximum number of trunk groups and ports (or lines) that can be configured per system?
Concerto can connect up to 144 T1 lines for inbound and outbound calls, for a total of 3,456 individual channels. However, system sizing is based on many factors including the number of agents, the call load, the average length of a call, the expected amount of conferencing, and whether or not the call is being recorded. This and other factors determine the appropriate number of trunks and the final system configuration.

3. What is the maximum number of calls per hour per system that can be supported?
A single EnsemblePro system currently supports up to 60,000 calls per hour.

4. What is the total number of routing rules that can be configured per system?
There are no known limits for the number of routing rules.

5. What is the maximum number of virtual agents (telecommuters) per system that are able to work from home?
Concerto can be configured for all agents to be remote, so the limit is 900 – that is, the same as the maximum number of agents on the system.

6. What is the hard limit to real-time or historical reporting?

The limit to retention of historic reporting data is the available disk space and the inherent limitations of the Sybase database in a data warehouse configuration. In other words, the solution is only limited by the ability of the chosen hardware environment.

7. Is there a maximum number of skills that can be defined per system in skills-based routing?
Each system can have a maximum of 999 defined skills. Once a skill is assigned to an agent, there are 10 levels of proficiency

8. What is the maximum number of preferences available to identify a skill in skills-based routing?
There are 10 levels of proficiency per skill. The business rules model allows a virtually unlimited number of decision elements to be considered in choosing a skill.

H. Reporting

1. What features are available to monitor call center activity? For example, is there support for real-time event monitoring, are there features to view and report queues that service multiple channels (i.e., voice, e-mail, fax, and Web), and can supervisors monitor and record agent activity for quality assurance or compliance with federal and state law? **Limit you answer to 250 words.**
EnsemblePro establishes a separate service for different types of calls (inbound, outbound, email, chat, etc. Each “service” (queue) can be monitored real time for key metrics – for example, the number of calls within service level for inbound or “hit rate” for an outbound list. Real time monitoring is also available for agent state and statistics for supervisor oversight of agent productivity. Supervisors have full capability for barge in, coaching, and passive monitoring of agent interactions. The system is also capability of digital call recording on a demand basis per call or on an “all calls” basis. Additionally, there is full historical reporting for each service. There are “out of the box” compliance reports for outbound calling as well.

2. Is business data available through the reporting module used for the call center? Y/N
Yes, by assigning disposition codes to various outcomes, business data can be tracked and data analysis capabilities may be invoked to track business level statistics. Additional integration is possible through published APIs.

3. Can reports run on regular schedules? Y/N
Yes, reports may run and print on a scheduled basis.

4. Can reports be automatically published for review in HTML or other formats for review by supervisors, etc.? Y/N
Yes.

5. What file formats can you export reports to?
- Acrobat Format (.pdf)
- Character-separated values
- Comma-separated values (.csv)
- Crystal Reports (.rpt)
- Excel
- HTML
- Tab-separated values

I. Business Summary (Optional)

You may use this section to summarize the business value that you are providing that you were not able to cover in any of the above sections. You may also use it to make additional recommendations or comments on the RFI. **Limit your answer to 200 words.**

EnsemblePro is a **complete contact center solution** that has been designed and built from the ground up to deliver the advanced functionality required by today's multimedia contact centers. And at the same time, **connect with and add value** to what you’ve already invested in. For

companies like yours, this is a major breakthrough. Because now you can reap the leading-edge benefits of a **unified** platform — while protecting and maximizing your current technology as never before. No other contact center solution is more flexible, more comprehensive, more cost-effective, more reliable.

EnsemblePro was recently internationalized and localized for multilingual support and is now available in eight languages: **American English, Traditional Chinese, Simplified Chinese, Japanese, French, German, Korean and Spanish.**

EnsemblePro is designed to be used as an enterprise resource for managing your contact center, including voice, email, fax, and web interactions.

Inbound, outbound, and blended contacts for Marketing, IT Support, Sales, Telemarketing, Collections, Up-Selling/Cross-Selling, List Penetration, Customer Profiling, Reporting by Application, Campaign, Team, Agent, etc., can all be accomplished via a single integrated, flexible, scaleable tool. This ability to standardize all these methods and cross reference them through unified reporting provides an extremely valuable enterprise tool for understanding your customers, your operational successes and opportunities, and provides the management information necessary to better manage your contacts.

J. Pricing Summary and Totals

1. Describe the business model used to market and sell the call center? **Limit your answer to 50 words or less.**

Concerto sells the EnsemblePro solution on a perpetual license, concurrent user basis with the first year's hardware and software maintenance and support typically included at the time of sale.

2. Is the system purchased through direct sale, resellers, and/or channel partners?

_X_ Direct sale
_X_ Certified Resellers
_X_ Channel Partners
__ Resellers
__ Other (Please explain)

3. Estimate the cost of the call center for Kodiak's 300 call agents.
Cost varies by the specific configuration and the number of optional features and interfaces required. The estimated retail cost of an EnsemblePro configuration required to support Kodiak's 300 agents is ~$800,000 in Software license fees. The Windows based servers and networking devices are provided by Kodiak and are not sold by Concerto. The gateway and DCP telephony hardware costs depend greatly on the specific calling patterns, amount of self service, and application requirements of Kodiak and cannot be estimated without a more detailed engagement with a Concerto sales team.

4. Estimate the cost for the first year of maintenance and support.
First year of maintenance and support for the Software estimated above is ~$140,000 inclusive of 7x24 call in support with software upgrades included.

5. Do you provide on site training?

___No
__X_Yes (answer question 6)

6. If you provide on site training, what would be the cost to train approximately 200 Kodiak agents and supervisors?

On site training is quoted on a daily basis at $2000/day with a maximum of 30 agents per class. Supervisor training is at the same daily rate, but typically includes much greater detail in system configuration and management and therefore class sizes are typically limited to 10-15 participants and typically extend into 3 day sessions depending on the defined role of the supervisor.

VII. Vendor Information

1. How long have you been in business?
30+ years.

2. What is the size of your organization by number of employees?
Approximately 1000

3. How long has the product been shipping?
EnsemblePro 5.2 became generally available in September, 2004.

4. Do you provide onsite support for installation and configuration?
Yes.

5. In how many cities do you provide onsite support?
Worldwide in 47 countries. We have offices in 8 major metropolitan cities of the United States.