NUASIS

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

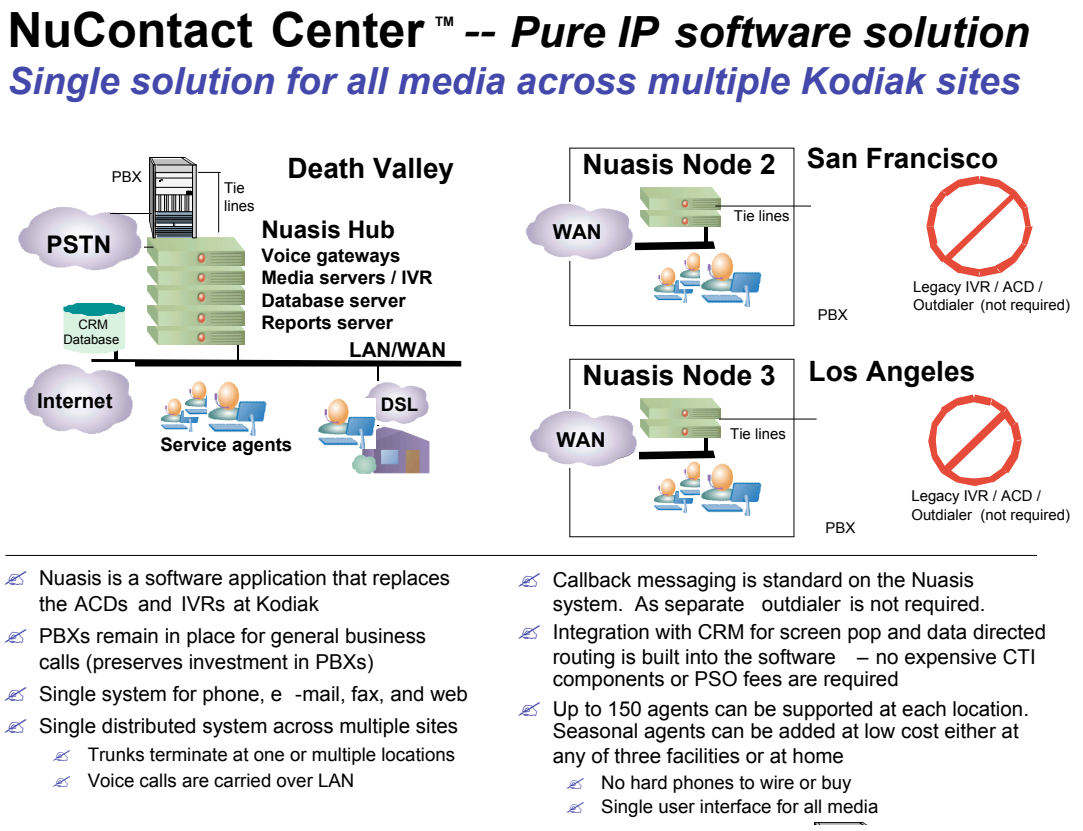
E. Reduce infrastructure costs by enabling agents to work remotely

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.



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.**

Achieving business goals

Unlike competitor hybrid solutions that use outdated telephony switches with IP transport between the switches, the NuContact Center is a software-only solution that operates entirely on a single data network. This advantage provides important benefits beyond transport cost savings from hybrid solutions to meet Kodiak's global business goals.

Improving customer service and lowering operational costs

1. **Combined media**
   The NuContact Center is a single platform that handles phone calls, fax, email, and web. It consolidates the ACD, IVR, email response application, and CTI for integration with

databases. As such it lowers the cost of managing separate systems and simplifies the administration of systems by providing consolidated reporting across all media.

Contacts can be blended in queue and prioritized based on business value. Unlike some systems, the system provides consolidated reporting across all media which gives Kodiak a single view of customer contact.

2. **Keep the PBX**
   Specific to Kodiak requirements, a significant advantage with the Nuasis IP contact center software application is the ability to improve contact center operations while keeping the PBX systems. This is a common approach when deploying the Nuasis system. The PBX is used for general business calls. The Nuasis software, designed to deliver functionality specific to the call center needs, is used to handle customer inquiries.

3. **Network centers together**
   A key benefit for Kodiak when is the ability to cost-effectively network its multiple centers in Death Valley, San Francisco, and Los Angeles. More importantly, to meet its global expansion goals, is the ability to quickly merge or open new centers globally at low costs. Unlike most other systems, the NuContact Center is a single distributed system.

   Two benefits: Contacts can be routed to the agent with the best skills to handle the contact wherever they may be located globally. Secondly, by pooling multiple dispersed groups of agents into a single networked pool of agents, Kodiak will be able to handle the same volume of customer contacts with fewer agents, thus lowering labor costs.

4. **Lower trunking costs**
   As with other systems, voice traffic is carried over the corporate IP network between sites. Specific to Kodiak requirements, PSTN trunks can be terminated on voice gateways at any location to reduce long distance charges for customers. It also has the advantage of allowing Kodiak to prioritize calls in queue based on business value in addition to them being local or long distance calls.

5. **Flexibility to add home agents**
   The Nuasis IP system easily supports the use of agents at home. The system does not require a hard phone which reduces costs to Kodiak. Agents use a web browser based softphone for all contacts. Agents simply log into the system as they would any other software application over the IP connection to Kodiak.

6. **Improvements in automation with CTI**
   Unlike other systems that require two networks and TDM components, the NuContact Center easily integrates with databases deployed at Kodiak without the need for CTI hardware, software, or professional service fees.

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**.

The NuContact Center has been designed to be easily configured to map to the needs of the customer's business. All contacts can be routed based on any business rule determined by Kodiak. As importantly, and unlike other systems, the priority in which contacts are handled can also be determined by any number of business rules. As an example, Kodiak has the flexibility to prioritize a gold customer service email over a routine inquiry phone call.

Contact routing may be determined based on information received by a caller over touchtone phone or provided over the telephony network. It may be determined by any information retrieved from a database – transaction data, customer purchasing patterns, product interest, customer status, value of the customer to Kodiak's business. Virtually any parameter can be used to determine business rules. In the case of using information retrieved from a database, the NuContact Center can be easily integrated with any type of ODBC database without the need for CTI hardware or software or integration costs. This allows companies to more widely access databases for important business rules information for routing.

In the case of email, contacts can be routed based on key word information in the address fields, subject line, or body of the email text.

Business rules are applied to incoming customer contacts in the same manner as they are applied to customer skill sets. Any number of business rules can be used to profile incoming contacts. That profile is then matched against available agents with the closest skill set profile.

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? YES If yes, please **explain in 300 words or fewer**.

All contacts are routed the same. The hub and each node are networked together across the company's local or wide area network, forming a single, distributed contact center. The NuContact Workflow Engine is the system module driving the entire customer experience from beginning to end. Every contact that enters the NuContact Center falls under the control of one of a set of workflows that are pre-determined by the contact center manager, based on conditions that are specific to the business needs. The workflow determines what kind of information is presented to the caller, how the contact is prioritized and routed, and the conditions under which a contact may be escalated or de-escalated.

Workflows run at the central hub location and at each node location, with each performing different tasks relating to contact distribution. Voice contacts enter the system at a node, while email and web contacts usually enter at the hub, where an initial workflow identifies the customer and segments or classifies the contact. The workflow also executes CRM queries needed for gaining more information in order to perform data-directed routing. The information gathered is tagged to the contact and determines the type of skills that are required for optimal handling.

The work of matching contacts with the best agent takes place within two core software modules called the NuContact Workflow Engine and the NuContact Business Logic Engine. Conventional contact distribution engines use a FIFO queuing model creating one queue for all the customers within each agent group, and agents are matched to customers on a first-in, first-out basis. The NuContact Center selectively routes contacts by prioritizing contacts. It routes each contact to the best agent based on a variety of factors including skill requirements, media type, agent availability and the history of a particular contact. (296 words)

3. Can Kodiak share the same business rules across all sites? YES As a single distributed software application, the NuContact Center applies the same business rules to groups or classifications across all sites.

4. Describe the difficulty and the tools necessary to make routing changes on a production system. Use 300 words or fewer.

The degree of difficulty to make routing changes on a NuContact Center system is minimal. The hub and each node are networked together across the company's local or wide area network, forming a single, distributed contact center. A single workflow tool is used to build routing schemes for all media types. The workflow tool determines what kind of information is presented to the caller, how the contact is prioritized and routed, and the conditions under which a contact may be escalated or de-escalated.

It is the first system to allow system mangers and business managers to easily and quickly alter priorities for handling contacts in queue without rewriting contact workflow instructions. This has been a major issue for companies in the past when dealing with dynamic changes in business conditions. Prioritization can take place in real time when needed. A graphical desktop tool is used to dynamically change the weighted averages applied to contact attributes that determine the priority of handling. Business managers can affect the priorities of contact handling on the fly to react immediately to rapidly changing business conditions.

5. Are carrier-based pre-call routing options necessary to implement your solution? NO If so, please detail the routing required by carriers and which carriers are certified for your product. Limit your answer to 250 words.

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.

Many different treatment options may be utilized based on wait time calculations. For example: An announcement may state that due to do heavy call volumes the caller may experience longer than normal delays. There may be options after the announcement for the caller to leave a voice message, request a call back, contact the center via e-mail, etc. The Nuasis solution has the ability to announce wait times.

The Nuasis solution provides many elements of real time and historic data that may be used to calculate wait times. The wait time algorithms may include customer type (gold or silver level customer) or contact type (customer service, new business), plus additional metrics key to the customer's business. Nuasis doesn't supply any particular algorithms, but allows customized wait time calculations that better fit the customer's needs.

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 YES

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 YES

D. Enterprise Integration

1. List the TDM-based PBX switches you support by vendor and model.

The NuContact Center software supports any existing TDM-based PBX infrastructure as it can terminate PSTN lines directly. Unlike other IP Contact Center solutions, the Nuasis software

requires no pre-existing telephony infrastructure to be in place. If connectivity to a PBX or ACD is required, the connectivity can be accomplished via a T1 or PRI tie line for transferring calls. Current customers have connected to Avaya, Nortel, Siemens, and NEC TDM-based PBXs. Any PBX/ACD that supports a T1 or ISDN PRI interface is supported.

2. List the IP PBX switches you support by vendor and model.

The NuContact Center software supports any existing IP PBX infrastructure as it can terminate PSTN lines directly. Unlike other IP Contact Center solutions, the Nuasis software requires no pre-existing telephony infrastructure to be in place. If connectivity to a PBX or ACD is required, the connectivity can be accomplished via a T1 or PRI tie line for transferring calls. Current customers have connected to Cisco, Shoretel and Inter-tel IP PBXs. Any PBX/ACD that supports a T1 or ISDN PRI interface is supported.

3. List the ACD (Automatic Call Distribution) systems supported by vendor and model.

The NuContact Center software can connect to any existing ACD infrastructure for the purpose of transferring calls between systems. Unlike other IP Contact Center solutions, the Nuasis software requires no pre-existing telephony infrastructure to be in place. Additionally, the NuContact Center software includes all routing intelligence to deliver phone, e-mail and Web contacts seamlessly across multiple locations. If connectivity to a PBX or ACD is required, the connectivity can be accomplished via a T1 or PRI tie line for transferring calls. Current customers have connected to Aspect ACDs. Any PBX/ACD that supports a T1 or ISDN PRI interface is supported.

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

The NuContact Center software has built-in IVR capabilities for caller prompting, playing digital announcements and music along with the ability to play back customer information gathered from enterprise databases. If a separate IVR is required the connection to traditional IVR systems is via a T1 or PRI tie line for transferring calls. Nuasis also offers a SIP integration to next generation VXML-based IVR systems. Current customers have utilized the internal Nuasis IVR or have used the SIP integration to VoiceGenie's NexusPoint VXML platform. Any IVR that supports a T1 or ISDN PRI interface is supported. Nuasis recommends the SIP integration to save on tie-line card costs.

5. If you supply your own IP PBX, what features are supported? Check all that apply.

> Not Applicable. The NuContact Center software is specifically focused on the call center application. It includes SIP telephony as part of the infrastructure, but it supports any existing TDM-based or IP PBX infrastructure.

__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).

Nuasis provides voice gateway software that runs on a Dell server with an AudioCodes TP260 T1 interface card. The Nuasis software sends out SIP messages to other Nuasis software running across the enterprise. This gateway software provides patent-pending features such as Nuasis automatic call redirect which detects a failure in the RTP stream (the voice packets), intercepts the call, plays a comfort announcement to the caller and redirects the call to an agent with full screen pop capabilities. Other vendors' voice gateways are unable to provide this level of application recovery at this time.

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**.

Nuasis provides voice gateway software that runs on a Dell server with an AudioCodes TP260 T1 interface card. The Nuasis software sends out SIP messages to other Nuasis software running across the enterprise. This gateway software provides patent-pending features such as Nuasis automatic call redirect which detects a failure in the RTP stream (the voice packets), intercepts the call, plays a comfort announcement to the caller and redirects the call to an agent with full screen pop capabilities. Other vendors' voice gateways are unable to provide this level of application recovery at this time.

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

Yes. The NuContact Center software includes all necessary modules to send and receive e-mail from all major e-mail applications via SMTP and IMAP. The NuContact Center can run in an environment where there is no corporate messaging application; however, the typical customer is likely to have such an infrastructure component in place. In all current Nuasis installations, messages that are received by the corporate server for call center mailbox addresses (e.g. support@mycompany.com) are routed to the built-in IMAP server that is part of the NuContact Center. Outgoing message are sent by the Nuasis SMTP server. Nuasis provides all users with a desktop client that provides the ability to see all call center e-mail messages by "classification" (e.g. Support or Sales). Included in this view for each classification are e-mail messages (including embedded fax messages), voice-mail messages and callback requests. Nuasis considers all of these requests to be "deferred" or that the customer has indicated a willingness to wait for a response.

The NuContact Center also offers Web chat and collaboration (page sharing) capabilities. This is accomplished by an end-user customer pressing a button on mycompany's Web site which redirects them to a Web server running Nuasis software. The contact is then routed to a live agent who simultaneously sees the same Web content as the end-user customer. There is a Web chat interface that is incorporated, but the ability to connect via a phone call is also built-into the application.

___ No (answer question 10)
_X__ Yes, the following packages are supported:
_X__IBM Domino/Notes
_X__MS-Exchange/Outlook
_X__Novell Groupwise
___Other (Please specify)

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.**

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

Yes. Any fax server that can convert the fax into an e-mail message is supported. The NuContact Center software then treats faxes as an e-mail with an attachment. Nuasis considers all of these requests to be "deferred" or that the customer has indicated a willingness to wait for a response.
___ No (answer question 11)
_X_ Yes, the following packages are supported:
_X__ Biscom
_X__ Captaris RightFax
_X_ Castelle
_X__CopiaFacts International
_X__ Esker Fax
_X__ Faxback
_X__ Faxcore
_X__GFI Fax
_X__ Interstar
_X__ Omtool
_X__ Softlinx
_X__ Other (Please specify) Any fax server that can convert the fax into an email message is supported.

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.**

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

Yes. The Nuasis software integrates with many Web servers at the application level. The NuContact software itself includes Web services deployed on Apache's Web server. Additionally, there are multiple layers of the Nuasis application that may communicate with different Web servers. For example, VoiceXML applications that are deployed integrate with enterprise Web servers. The Nuasis routing logic may hit a Web page to gather real-time data for data-directed routing purposes. The screen pop implemented at an agent desktop is often browser-based and thus connects to an application web server to deliver a particular helpdesk application case screen.

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

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?

No. The NuContact Center includes integrated callback messaging as a built-in capability. Callers are prompted to leave a message depending on business conditions. Those messages are encapsulated into e-mail containers, but the tracking is uniquely identified for voice

messages, e-mail messages and callback requests. A Nuasis user is able to make callbacks by clicking on the phone number (a SIP URI link) that then places the outbound call via the PSTN.

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

_X_ 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.

_X__ IBM DB2
_X__ MS-Access
_X__ MS-SQL
_X__ MySQL
_X_ Oracle
_X__ Postgres
_X__ Other (Please specify) Any JDBC-compliant database

17. Is the database included with the call center or does the customer supply it? Check the appropriate response.

_X__ Included in the call center application (Oracle)
__ Supplied by the customer

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

As a software-only system, the NuContact Center can connect with any system without the need for CTI or API.

_X_ E.piphany
_X_ Oracle and Peoplesoft
_X_ SAP
_X_ Other (Please specify) Vantive, Siebel, Remedy, RightNow, Salesforce.com

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

_X_ 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
_X_ Yes, gratis
___ Yes, at cost of: _____

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.**

As a Pure IP software application, CTI is not required for screenpop or data-directed call routing in order to interface with databases.

With the NuContact Center, CTI functionality is delivered as a “built-in” core component of the system, rather than as an add-on. The NuContact Center does not require the purchase of CTI-specific hardware and/or software. Nuasis has delivered many CTI applications for its current customers in a matter of days as a part of its standard implementation process vs. weeks or months with professional services engagements with contact center solutions from traditional vendors. Again, a key strength of the NuContact Center architecture is the elimination of CTI middleware. This means that the cost of delivering screen pops and data-directed routing (DDR) with integrated with customer applications drops dramatically with Nuasis. Screen pops and DDR are accomplished using a series of configurable workflow steps, instead of long professional service engagements and CTI programming.

As importantly, by lowering the cost barrier to deploy screen pop and data directed routing applications, Kodiak can more broadly deploy these applications across multiple databases and multiple sites.

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.**

As a Pure IP software application, CTI is not required for screenpop or data-directed call routing in order to interface with databases.

CTI Built-In. Because the NuContact Center operates on one network, it minimizes or eliminates the need for complex and costly integration efforts associated with CTI projects. The system supports easy integration with enterprise CRM systems to support applications such database dips and customer record delivery (screen pops) to the agent desktop. Developing such applications is a matter of simple system configuration versus traditional complex integration projects. No custom development is required. Applications such as screen pop and data directed contact routing can be deployed in days versus weeks or months with traditional two-network systems. Nuasis believes that the inherent benefits of Pure IP and CTI Built-In will create a shift in the call center industry to wider deployment of CTI applications from its current 15-30% deployment rates to 85-95% deployment rates. Currently, almost 100% of Nuasis customers are deploying CTI applications.

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

The NuContact Center can be easily integrated with any JDBC application without the need for costly APIs, CTI hardware or middleware, and professional deployment services. Nuasis installed customers with CRM applications for the following vendors: SAP, Oracle, Siebel, Vantive, PeopleSoft, Remedy, and customer-developed database application. Internally, Nuasis has also integrated with Salesforce.com and RightNow Technologies.

In addition, Nuasis installed NuContact Center customers can be easily integrated with specific workforce management and quality monitoring systems including Envision, Witness, GMT and Aspect eWFM.

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

VoiceGenie. Offers the premiere self-service voice platform based on SIP and VSML standards. Nuasis and VoiceGenie products are tightly integrated using SIP protocol. The companies have partnered since August of 2003. The two companies have joint customers installed.

RightNow. A leader in hosted CRM applications. Nuasis and Right Now currently have a sales agreement and Nuasis has developed integration between the two applications

Salesforce.com. A leader in hosted CRM applications. Nuasis and Salesforce.com have a sales agreement and Nuasis has developed integration between the two applications.

IEX. Workforce Management software. The partnership was established in August of 2003.

Symon Communications. Workforce Management Software and Reader board Technology. Nuasis has been a technology alliance partner with Symon since February of 2004.

Castel. Outbound applications. Most recently Castel and Nuasis have agreed to partner on call center solutions requiring both inbound and outbound applications.

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

Nuasis recognizes that companies operate multiple enterprise applications within the call center and these are typically not integrated within the call center. These applications include IVR for self service, Workforce Management Software for resource scheduling and planning, Quality Monitoring for agent training, specialized out dialers for outbound campaigns, e-mail, web applications, and CRM integrations. With the Nuasis IP-based software application, customers can more easily and cost-effectively integrate with other call center applications using common standards such as SIP, VXML, SOAP, and others.

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.**

The Nuasis NuContact Center routes voice, e-mail, web, and fax contacts based on customer defined business rules. These rules are flexible, allowing the customer to route and prioritize based on media type, customer value, queue time or virtually any other attribute. Agents receive inbound contacts based on the contact's priority, regardless of the media type. Businesses can choose for an agent to receive a web session followed by a voice contact followed by a voice callback. Agent profiles determine the type of contact media an agent can or cannot handle.

All capabilities of the NuContact Center are delivered through a single browser-based interface. The agent is initially alerted of the new contact (whether voice, email, web or fax) on the Agent Desktop. The NuContact Center provides a single, consistent interface that provides a unified view of voice, email and web contacts and a universal set of tools for handling them, including a soft phone on the desktop. As a single multi-media application with an intuitive graphical interface, the NuContact Desktop helps agents transition easily between media types with familiar icons, well laid-out task flows and consistent placement of application windows. NuContact Center Shutters is an application specifically designed to improve the efficiency of handling all contacts on a desktop. Shutters automatically sizes and places all contacts so that the agent is not forced to waste time reducing or enlarging windows from the bottom of their screen.

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?

Chat/web collaboration contacts can be routed to the best available agent based on the same business rules as voice calls anywhere on the network. The Nuasis solution lets the business manager or contact center manager determine the business value of the contact and matches it to the agent with the most appropriate skill set. For example, a chat session from the most important customer group may be prioritized to be handled immediately, ahead of any waiting voice call. A chat session is initially presented in the same manner as a phone call on the agent desktop. When a chat comes in, it opens in Shutters. The chat session will be routed to the agent

best equipped to respond to the message. When the chat session is presented to the agent, the screen pop will appear in the same manner as with a voice call.

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

Nuasis uses open industry standards for communication between different applications including the NuContact Center software. As a Pure IP software application, traditional CTI protocols are not required for screenpop or data-directed call routing in order to interface with databases. The system does support these standards:

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

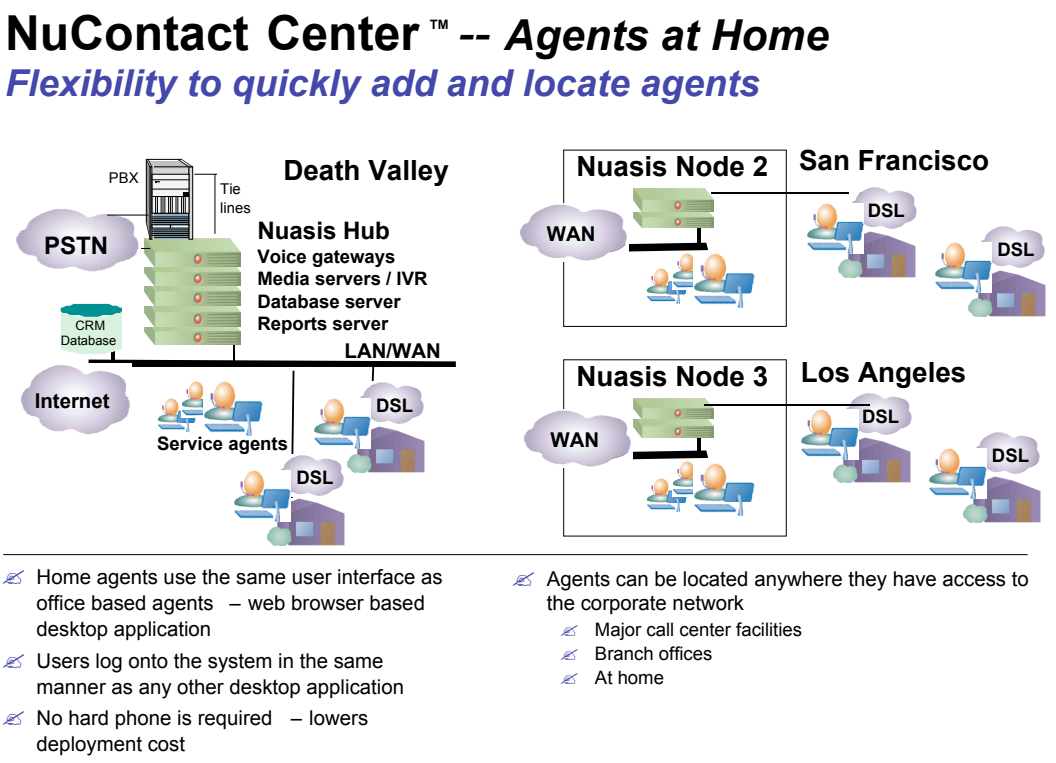
F. Telecommuting

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: NuContact Center Agent Desktop

2. Provide per employee price for telecommuting product: no additional charge

3. Provide a diagram of your proposed telecommuting solution.



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

Remote agents have the identical capabilities of standard agents. Remote agents logon to the NuContact Center through a web browser, just as standard agents do. All call routing logic, messaging and announcements to all agents are supported, as long as the agent has access to the corporate WAN. Agents can log onto the NuContact Center from any location. User interface is a Java application that runs on the desktop. Security is accomplished via VPN access to the corporate network. Agent skill assignments and application assignments are configured in the system and determine what contacts are routed to the 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**.

Because it is a single, distributed system, servers can be located anywhere on the corporate data network to create a single, geographically dispersed contact center. The system was architected to scale to several thousand agents. The Nuasis product roadmap includes feature enhancements, integration, and scalability/availability improvements.

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

500 total in the current release

2. What is the maximum number of trunk groups and ports (or lines) that can be configured per system?

Unlimited. The distributed architecture of the NuContact Center allows the system to scale linearly with additional nodes. Today, the NuContact Center supports up to 500 agents across up to 5 sites. Each site, or node, supports up to 150 agents. This architecture will ultimately scale to several thousand agents.

3. What is the maximum number of calls per hour per system that can be supported? 50,000

4. What is the total number of routing rules that can be configured per system?

Unlimited. The NuContact Center's Enterprise Routing Architecture enables systems to be configured with an unlimited number of routing rules that best reflect the business needs of the contact center to process, classify, and deliver contacts from a variety of media types - voice, e-mail, Web. This is done by developing workflows, or sets of instruction steps, in the NuContact Workflow Builder, and using the NuContact Center's skills matching engine to deliver a particular contact to the agent whose skills best match the customer's needs, regardless of the location of the contact and the agent.

5. What is the maximum number of virtual agents (telecommuters) per system that are able to work from home?

All agents. The Nuasis NuContact Center enables NuContact Center users (agents, supervisors, managers, and administrators) to work from locations that are both local and remote to the Nuasis NuContact Center with support for the same desktop. Today, the Nuasis NuContact Center supports up to 500 agents across up to 5 sites with each site, or node, supporting up to 150 agents. Any, or all, of the agents can either be local or remote to the NuContact Center system.

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

The Nuasis NuContact Center provides a comprehensive set of consolidated historical and real-time reports covering all agent and contact activity, including voice, email, fax, and web, in the contact center. The Nuasis NuContact Reporter provides 44 standard reports and NuContact Real-Time Status Viewer provides 17 standard real-time views. Customers can customize the standard reports or create their own by using standard Crystal Reports capabilities (licensing must be customer-provided). In addition, Nuasis can develop customized reports as part of a professional services engagement.

7. Is there a maximum number of skills that can be defined per system in skills-based routing?

Unlimited. In the NuContact Center, there are no limitations to the number of skills supported per system. In addition, the NuContact Center does not require a skill to be defined to identify agents who answer various media types - voice, e-mail, Web, fax - or who handle multiple geographical locations. Agents typically have two-three skills associated with their profile for areas such as product knowledge or language.

8. What is the maximum number of preferences available to identify a skill in skills-based routing?

Unlimited. The NuContact Center has no limitations on the maximum number of skill preferences per agent. Each agent is assigned a set of skills (e.g. language, product) along with a preference and a proficiency level for each skill. A skill with a higher preference identifies the skill the agent would choose to use in a situation where there was a choice of using more than one skill. The proficiency level represents the agent's level of expertise in using that particular 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.**

The NuContact Center provides a comprehensive set of consolidated reports covering all agent and contact activity, including voice, email, fax, and web, in the contact center. Reports on agent activity contain information about how individual agents handled contacts during the reporting interval based on team, classification (application, queue), skill, and media type. Agent productivity results are in summary and detailed formats for individual agents and teams across all media types. Data can be broken down by the individual media types or be summarized to exclude the specific media types.

It can capture, store and report on all activity in the contact center. The reporting data falls into two broad categories: information about the contacts and how they move through the system, and information about the users of the system. Contact event data is rolled up into detailed and universal records for historical reporting purposes. Reports can be filtered to determine what information appears in each report, including the ability to filter for media type.

The detailed data collected by the system is compiled from events generated by agents, customer contacts, components, trunks, and nodes associated with the system. Event data is collected in real time in the local databases within each node. The local databases regularly push data to the central database, which rolls the event data into detailed records. Further consolidation happens when all detailed information about a customer contact is rolled up into a single universal record that covers the life of the contact.

2. Is business data available through the reporting module used for the call center? Y/N YES

3. Can reports run on regular schedules? Y/N YES

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?

Report data can be exported to another application in popular file formats. Call detail data can be extracted from the NuContact Database by an external application using standard SQL commands to retrieve data.

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.**

Nuasis is committed to delivering products that satisfy two goals of companies when operating contact centers – improve service to their customers and lower contact center operating costs. We serve the needs of companies operating medium and large, single and multiple dispersed customer contact centers as a mission critical means of doing business. VoIP and the capabilities built into the NuContact Center allow its customers to satisfy these goals.

As a product strategy, Nuasis has taken a new direction with its product compared to traditional TDM switches for routing contacts. It leverages VoIP to consolidate multiple media contacts (phone, e-mail, web sessions) on a single software platform that allows companies to provide the

most cost-effective service model (self-service, deferred assistance, immediate assistance) to their customers.

The company is solely focused on the contact center application. As such, the company is committed to delivering a deeper level of support and service to customers. Therefore, system reliability and supportability are a cornerstone of the company's product directions strategy. The company is committed to delivering a set of innovations that capitalize on the new converged IP network environment within corporations and that support the fundamental goals of improving service and lowering costs.

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.**

Enterprise software application
Customer owns and operates

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

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

3. Estimate the cost of the call center for Kodiak's 300 call agents.

Approximately $2,000 per agent; $600,000 for the system

4. Estimate the cost for the first year of maintenance and support.

Nuasis charges 18% for business day support and 24% for 24x7 support.

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 included with the standard Nuasis implementation. All agents and supervisors are trained to use the system before initial cutover at no extra charge.

VII. Vendor Information

1. How long have you been in business?

   Nuasis was founded in 1999 originally as an ASP model for call centers. The company introduced the enterprise software product, NuContact Center in 2003. The company is

funded by a premiere set of venture firms including two firms that funded Aspect Communications in the mid 1980s.

2. What is the size of your organization by number of employees? 70

3. How long has the product been shipping? Since April, 2003

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

5. In how many cities do you provide onsite support?

All Nuasis customers may receive onsite support. Unlike other solutions, Nuasis is a software-only application. Normal, routine maintenance is done via remote access. Onsite support is based on a determination by Nuasis that onsite is required.