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,.

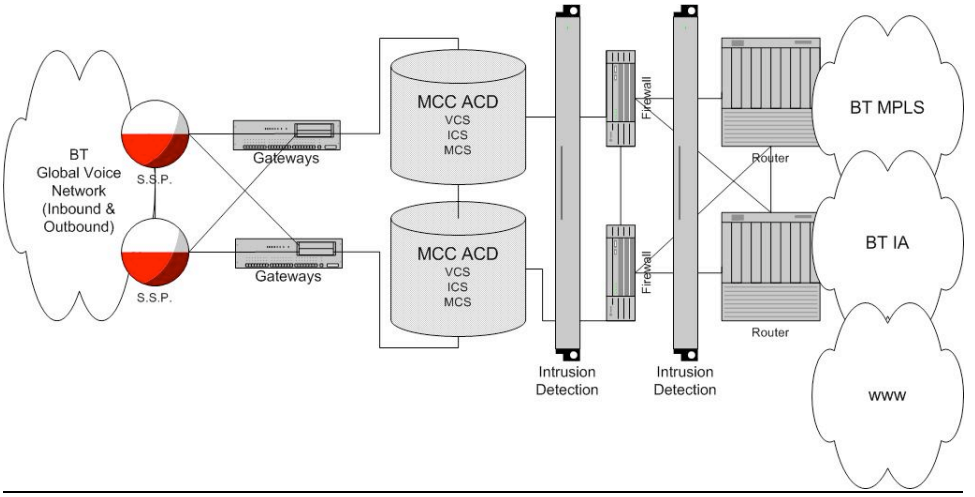
C. Decrease costs by supporting voice and data on a single network
D. Eliminate toll charges between sites
E. Reduce infrastructure costs by enabling agents to work remotely

VI. Review Criteria

The proposed solutions will be graded on the following criteria:

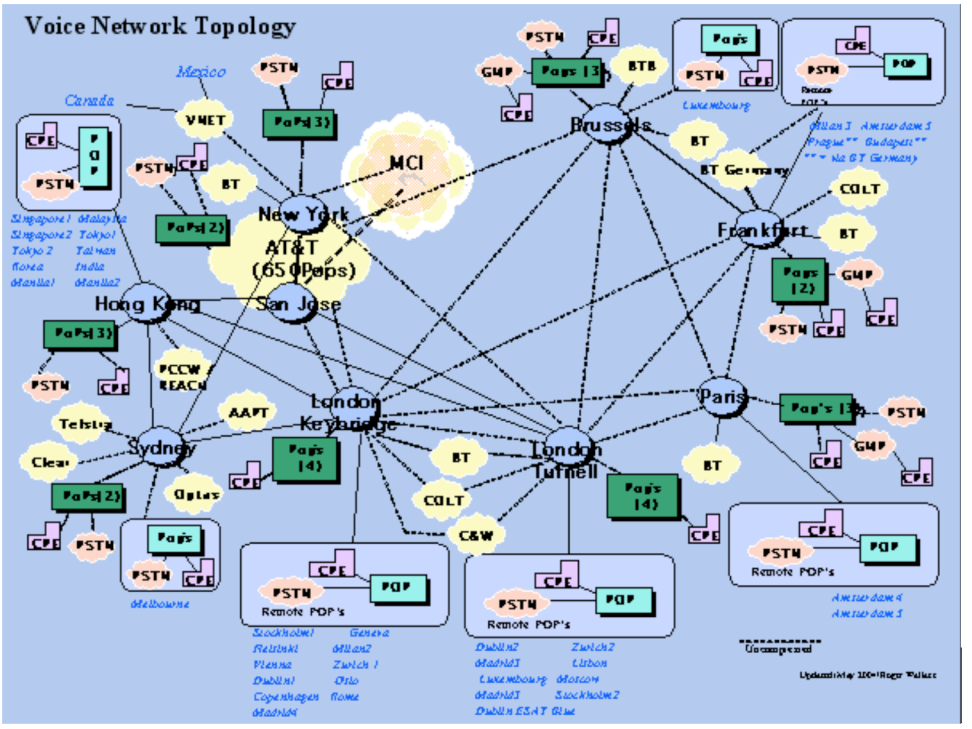
A. General Architecture

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

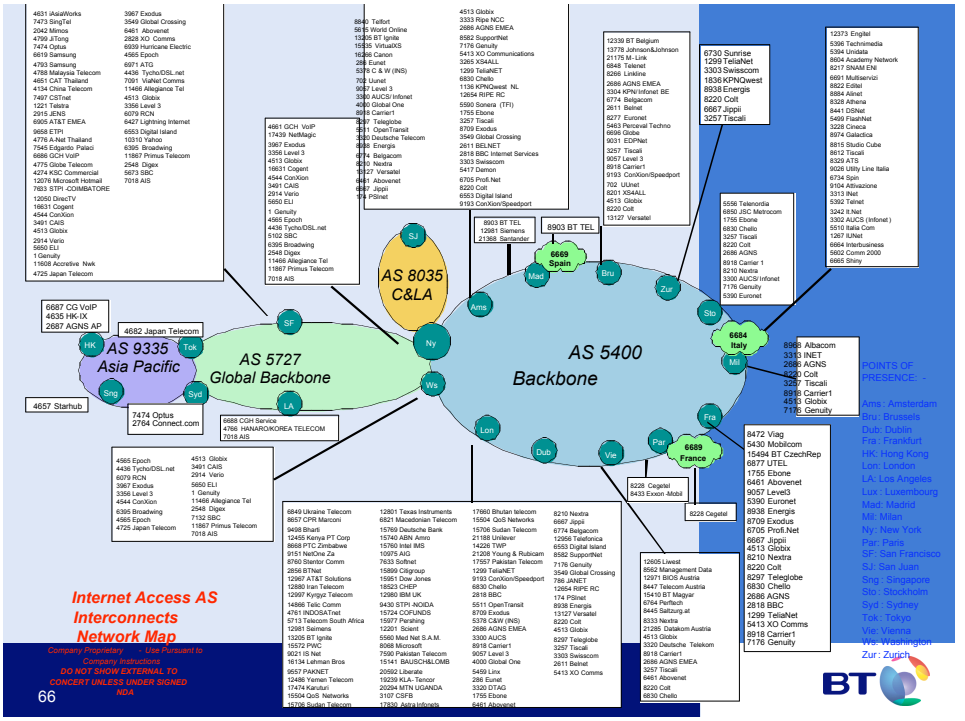


BT MCC (Multimedia Contact Centre) is a network-based, multimedia IP ACD. The MCC Platform can seamlessly handle both inbound and outbound TDM calls, VoIP and Video streams, collaboration, email, and chat. To facilitate the various interaction methods, the MCC platform is tightly interconnected with BT's voice and IP networks to provide a seamless and a very flexible interaction routing matrix.

The BT Global Voice Network (CCS) is a worldwide TDM and IP network that supports over 3000 call centers worldwide with intelligent routing functionality.



The BTIA network insures quality service to remote agent positions anywhere in the world as it provides a peer to peer connection to over 200 ISPs around the world.



In addition, BT is a provider of local service in many countries across the world. The BT global network can provide PSTN access in over 30 countries.

Platform Components:

- ACD Servers
  - Routing logic and scripts
  - Agent status tracking
  - Reporting function
- Voice Gateways
  - TDM to VoIP conversion
  - Interconnection with BT's global voice networks
    - Inbound access from 150 countries
    - Outbound capabilities to anywhere in the world
- Voice Communication Servers (VCS)
  - Call session control function
  - IVR functionality
  - Supports SIP and H.323
- Internet Communication Servers (ICS)
  - IP session control function – chat and collaboration
  - Interconnections to BTIA (public) and BT MPLS (private) IP networks
- Message Communication Servers (MCS)
  - Messaging application integration
  - E-mail, voice mail, call-back, queue management

All of the hardware is hosted by BT, which makes the MCC solution independent from any CPE based equipment, with the exception of agent workstation and /or telephone. The requirement on the agent premise is that the agent is directly addressable by the platform – typically agent's IP address. It is also possible to have phone-only agents, in which case there is no IP connection needed.

With BT's hosted solution, Kodiak is able to leverage its existing equipment and have a state of the art multi-channel routing solution in place in a short amount of time with very limited upfront capital requirements.

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.

From a commercial perspective, BT hosted solution makes great sense. Customers can move toward a true pay-as-you go model without spending significant (if any) capital to transform their call center into a true contact center. The monthly charge is based on the maximum number of concurrent agents logged in a given month. This means that customers can scale up and down depending on business needs. This also means that customers do not have to buy unnecessary licenses, but can scale up or down with BT's MCC service.

Not only does BT provide the platform and the multi channel capability, it also provides many other benefits as part of its offer, which need to consideration when comparing the costs between hosted and CPE based solutions:

Category	BT MCC	CPE
Equipment: • Core servers • Gateways • Security • Facilities	• Included as part of the service	• Customer needs to procure and deploy • Staff needs to be trained to support the

• Maintenance • Upgrades • Lab		solution.
Software: • Core software • Security • Network management • Maintenance costs • Support • Upgrades • Lab	• Included as part of the service • No need to buy too many or too few licenses as MCC allows to scale up and down as needed • Releases are thoroughly tested before new releases rolled out to customers	• Customer needs to procure based on their estimated peak number of agents • Customer assumes the technology risk with own purchase • Customer needs to establish upgrade processes that do not interfere with production platform
Network: • Voice interconnect • IP interconnects • Support • Global reach	• Network interconnects already established and managed by BT, thus providing a single point of contact	• Customer to setup own network interconnects and manage them. No single point of contact.
Staffing: • Platform support • Software support • Application design • Application integration	• BT can provide these services.	• Customer needs to either hire staff or an external company to manage the platform

When comparing all of these costs, a solution based on BT's MCC typically costs 30-50% less than a CPE solution with the same functionality and support. Many of the support costs naturally depend on whether the customer's resources are fully utilized or whether new people are needed.

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.

MCC's ACD provides one point of queuing and routing for all contact types, including telephone, email, voice mail, web chat, web voice, web video, and web collaboration. All of these contact types are seamlessly blended into a single queuing and routing intelligence (the universal queue or "UQ"), and all can follow the same call flow and routing rules. In addition, all contact types are tracked and managed through one database and one set of reports. Agents are organized into agent groups with customer-defined, many-to-many relationships between queues and groups. In addition to these basic building blocks of queues and agent groups, the ACD supports skills-based routing with skill weighting, priority routing based on target quality of service (QoS), and routing by contact type and customer value. MCC features a robust service creation environment that enables the rapid design of call treatments and routing logic. In addition to its extremely flexible collection of forms-based tools to define routing rules, the system features scripting tools that enable users to create virtually any conceivable set of routing rules, no matter how unusual.

The most commonly used business rules are:
- Skills based routing

    - Match customer with the most appropriate agent
    - Option to add skills, remove skills during contact flow
- Priority routing
    - Differentiate level of service based on type of customer
    - Assign QOS value to an interaction to set customer priority in queue
- Queue based routing
    - Match callers with the most appropriate queue or shortest queue
    - To manage QOS targets, interactions can be routed secondary queues if primary queue is unable to respond within prescribed quality of service targets
- Other supporting routing features
    - Customer identification through database query before forwarding to agents
    - Time / day dependant routing
    - Contact forwarding or transfer to other agents

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.

MCC provides one point of queuing and routing for all contact types, including telephone, email, voice mail, web chat, web voice, web video, and web collaboration. All of these contact types are seamlessly blended into a single queuing and routing intelligence and all can follow the same call flow and routing rules. In addition, all contact types are tracked and managed through one database and one set of reports.

The platform handles all dynamic routing and will route each call to the most qualified agent. Agents are associated with agent groups that can then be matched to one or many queues. Users can define which queues are primary queues and which queues are secondary queues (the calls in the primary queue always having precedence). Many factors, including the skills required, the value of the caller, the idlest agent, and the priority of the call, determine the routing rules.

Independent of the contact method all customer contacts can be passed through one queue. The distribution of the contacts among the agents is done based on the required and available skills and the QOS targets associated with the respective contact method. So while all types of contacts can be dealt with the same priority, the MCC provides a mechanism to weigh the importance of the contact methods according to business needs. For example, Kodiak may choose to assign a higher priority to telephone and web contacts than to fax and email.

3. Can Kodiak share the same business rules across all sites?

Yes. It should however be noted that the business rules are down to the agent level (and not site level), allowing Kodiak to leverage their total employee base far more efficiently and improve customer service by connecting customers with the appropriate agent immediately.

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

With MCC, Kodiak will receive the necessary tools to create and manage the customer service application centrally by itself if desired. There are two application management tools:

- MCC Designer
- MCC Admin

Each tool includes a comprehensive set of GUI-based tools that enable easy and quick real time, on-the-fly changes, which are automatically distributed to all impacted components. These interfaces are described below.

MCC Designer tool is a robust service creation environment that enables the rapid design of routing logic. In addition to its extremely flexible collection of forms-based tools to define routing rules, the system features scripting tools that enable users to create virtually any conceivable set of routing rules, no matter how unusual. MCC Designer allows users to not only define the IVR dialogue, but also to design the entire call flow through the ACD queues, without resorting to complex programming techniques.

With MCC Admin tool, Kodiak has the ability to:

- Create, delete, or modify queues and groups
- Create, delete, or modify personnel, skills, wrap-up codes, release codes
- Upload or download IVR scripts and prompts for announcements
- Set routing parameters, recording configurations
- Manage the overall assignments of the virtual contact center
- Access to real time and historical reports
- Configure privileges for agents and agent groups

Agents are organized into agent groups with customer-defined, many-to-many relationships between queues and groups. All queues are universal queues, capable of containing any and all contact types.

Since both tools are web-based, they enable Kodiak's contact center managers to have central control of customer service operations for the entire company without being tied to a specific location.

The administrative tools are intuitive and easy to learn. While a two-day training course is recommended for administrators to shorten the learning curve, it is not mandatory or essential.

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.

The MCC provides the pre-call routing functionality and hence it is included as part of the offering as described in the earlier sections.

In addition, the BT Global Network provides standard TOD, DOW, % Allocation, Maximum Calls Allowed and other IN based intelligent routing to or from the MCC service. This provides further integration of Web based Agents to in place premise ACDs.

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.

MCC can provide queue information to customers – eg estimated wait time or position in queue. This capability exists for both telephone and web based customers.

C. Queuing
(prioritization of routed contacts)

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

Yes – MCC will hold the call until it has identified and agent to whom to pass the call. MCC platform supports platform based queuing and hence will always check the status of the call.

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

Yes – MCC can route contacts to a secondary queue in the event that the primary queue is unavailable or fully utilized. These rules can be set using the tools available to Kodiak.

4. Can agents be interrupted from a current task to handle high-priority contacts? Y/N

Yes - it is possible to have an agent respond to e-mails and put those on hold if a higher priority contact comes. However, BT does not necessarily recommend this approach, because once an e-mail has been routed to an agent, (assuming that e-mails are lower in priority than telephone calls) it has reached a maturity value that it needs to be dealt with in order to preserve established QOS targets.

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 – there are a number of ways accomplishing this. By re-prioritizing those calls that have tried the self-service module, Kodiak can ensure that those customers have precedence in queue. Also, by tracking the call maturity of the call from the start, the customer will maintain position in queue should they opt to speak with an operator.

D. Enterprise Integration

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

MCC can co-exist with virtually any PBX. There really is no integration needed between MCC and Kodiak's PBX. MCC Agents making or receiving TDM calls through the PBX, will need to have their own phone numbers / extensions.

The BT CCS (Contact Center Service – a global network providing intelligent call transport to call centers around the globe. CCS provides Toll Free, Shared Cost, or Local Numbers from over 150 Countries around the world and is directly connected to the MCC platform as is BTIA – a peer to peer IP network used by over 200+ ISP – and BT Global MPLS – a multi- class of service IP network) has connections to over 3000 ACD / PBXs world wide and can be use as a network integration layer between MCC and TDM ACDs.

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

MCC can co-exist with virtually any PBX. There really is no integration needed between MCC and Kodiak's PBX. MCC Agents making or receiving calls through the PBX, will need to have their own phone numbers / extensions.

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

MCC can co-exist with virtually any ACD. There really is no integration needed between MCC and Kodiak's ACD. The ACD functionality resides in the network, and provides call routing down to the agent level enterprise wide. MCC Agents making or receiving calls through the ACD, will need to have their own phone extensions.

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

MCC includes its own integrated IVR, which eliminates the need for Kodiak to support the current premise based IVR platforms. The benefit from using the MCC IVR solution is that it is easily integrated and configured into the routing—e.g. matching callers menu selections with required agent skills to process the call.

In addition, BT provides a stand alone network based IVR platform that is multilingual (based on Nortel MPS -1000 and Aspect Open IVR). This can be used in conjunction with MCC for enhanced services.

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

__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).

As MCC is a hosted service, BT provides the gateway functionality as a standard, pre-integrated feature. The BT gateway supports both H.323 and SIP.

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.

N/A

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)
___ Yes, the following packages are supported:
___IBM Domino/Notes
_x__MS-Exchange/Outlook
___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.

___ No (answer question 11)
___ Yes, the following packages are supported:
___ Biscom
___ Captaris RightFax
___ Castelle

___CopiaFacts International
___ Esker Fax
___ Faxback
___ Faxcore
___GFI Fax
___ Interstar
___ Omtool
___ Softlinx
_x__ 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.**

Fax is supported through using Kodiak's existing fax servers to convert faxes to e-mails. These fax e-mails would be then routed through MCC and be subject to routing rules specified by Kodiak.

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
_x__ Sun Java Enterprise System
_x__ Zeus
_x__ Other (Please specify)

The type of web server is secondary as far as MCC is concerned. BT's MCC service can be interface with web servers using generic web service lookups (SOAP). Also, a simple script is used to create a link or a button that is scripted to launch the interaction with an agent, including collaboration.

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.**

N/A

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?

MCC is a fully integrated and supports outbound calling. Administrators can however specify whether agents have outbound calling privileges.

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.

___ IBM DB2
___ MS-Access
_x__ MS-SQL
___ MySQL
___ Oracle

___ Postgres
___ Other (Please specify)

The MCC solution itself uses MS-SQL. Host connect interface between the MCC platform and customer database applications can be built with all database options listed above.

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
___ Supplied by the customer

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

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

- RightNow
- Siebel
- Salesforce.com
- Onyx
- MS CRM

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.**

BT MCC supports a wide range of capabilities for integration with third party applications. MCC supports two basic methods of integration with other IT applications such as CRM: agent desktop (first party), and back-end (third party).

Agent desktop integration can be achieved quickly and inexpensively, often in hours rather than days, or in days rather than weeks or months. This method is also very well suited to the hosted environment, in which different tenants have different applications with which to integrate; and to environments in which each agent may require multiple integrations and multiple screen-pops. This type of application integration is facilitated by MCC's rich set of open, standards-based interfaces, which are easy to use and well understood by a large number of programmers, and by an out-of-the-box integration enabler for packaging MCC with leading CRM applications. The

platform also supports more traditional back-end (third party call control) integrations using XML-based CTI techniques.

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.**

BT offers an API to connect the MCC Agent client with complementary software products such as CRM and knowledge base products. Using this API enables an MCC Agent and the third-party applications to be viewed and managed as a single application on the agent's desktop. BT provides out of the box plug-ins to many popular CRM packages, and additional plug-ins can easily be developed using the MCC API.

MCC APIs are based on open computing standards, such as XML, HTML, .ASP, and COM.

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

The MCC solution has been integrated with a number of applications, but there is really no limit as to which applications can be integrated with MCC. Integration options are not just limited to CRM applications and also include POS, ERP, Helpdesk, Ticketing, WFM applications.

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

N/A

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

BT Consulting and Systems Integration (BT CSI ☺) provides both integration and support for 3rd party applications. BT can act as the single point of contact for not only Kodiak's networking needs, but also for IT and outsourcing.

In addition, BT has strategic relationships with other systems integrators, including HP and CSC.

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.**

Alerts for incoming customer contacts can be both visual and auditory, with customizable ring tone. In the preferences, agent can select an option for the client to pop up upon receipt of an incoming contact.

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?

The platform handles all dynamic routing and will route each call to the most qualified agent. Agents are associated with agent groups that can then be matched to one or many queues. Users can define which queues are primary queues and which queues are secondary queues (the calls in the primary queue always having precedence). Many factors, including the skills required, the value of the caller, the idlest agent, and the priority of the call, determine the routing rules.

As the agents log onto the platform, their IP addresses are registered on the platform, specifically by the agent interaction server (AIS), which monitors the agent status and activity in real time.

MCC will provide session control for any interactions between customer and agent. The same approach applies to all agents, whether working remotely or in an office.

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

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

ASP
COM

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.

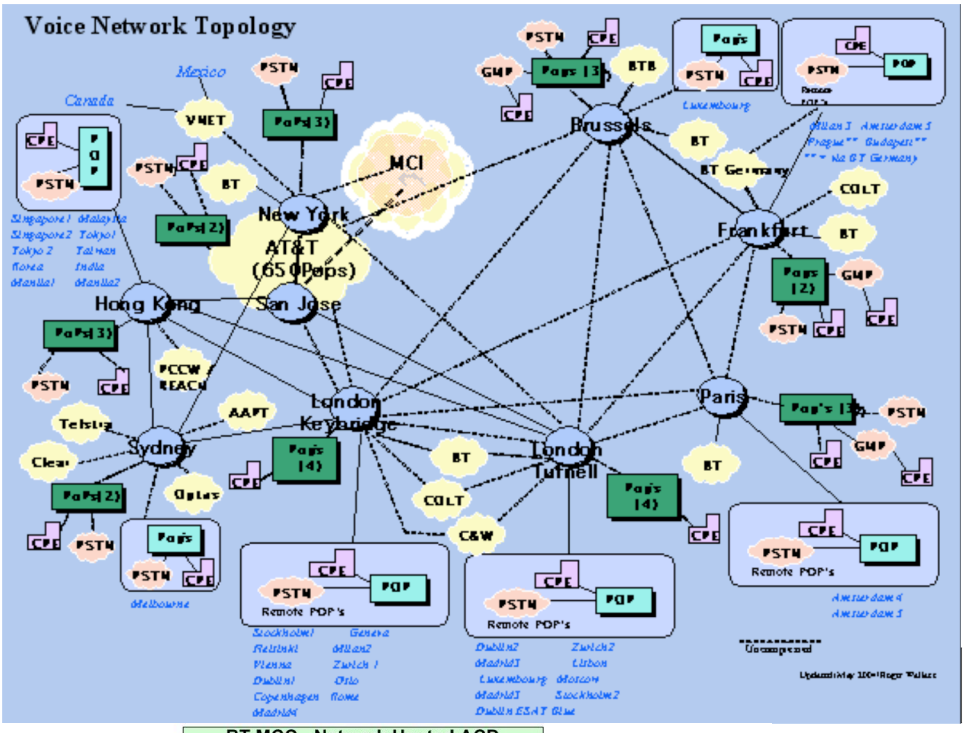
1. Provide name of telecommuting product:

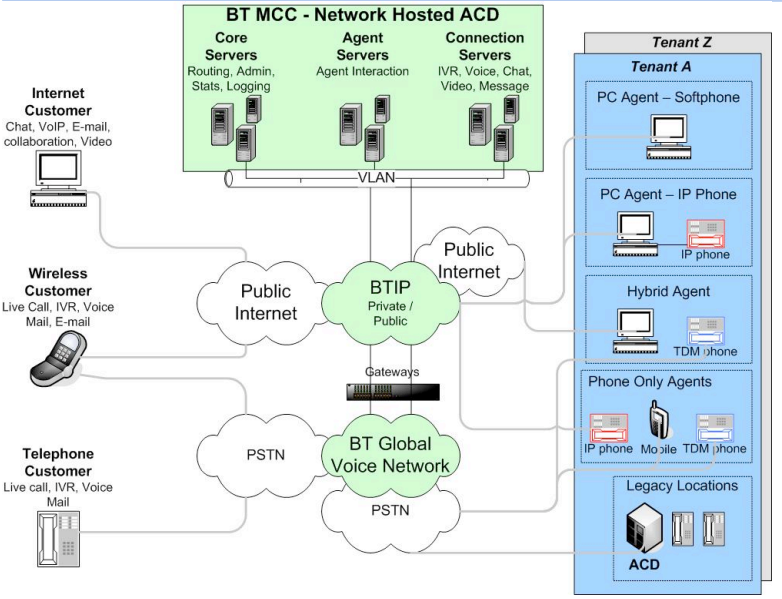
BT MCC client is the same for telecommuters as it is for office workers

2. Provide per employee price for telecommuting product:

Price is dependent on functions used by agents. Price per simultaneous user ranges from $100 to $300 per month.

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.**

MCC platform is designed with security as a high priority. Security is essential in every system, but it requires special attention in a hosted solution. To ensure the greatest possible security, MCC utilizes a “Total Security Solution” approach, which includes tenant, database, and communication security components.

To ensure that all traffic among the platform's components and agents is transmitted in a secure fashion, MCC utilizes SSL with 128-bit encryption in its InterProcess Communication (IPC) layer. SSL is also used in any web services communication that utilizes HTTPS via port 443.

MCC utilizes Microsoft Active Directory for user information storage and creation. Active Directory, which is inherently secure, is designed to support organizational units of landlord, sub-landlord and tenant. Using Active Directory, tenants can create users with different security levels, such as administrator, supervisor, and agent, and can also define custom security groups. Security settings are inherited, i.e., a user with certain privileges may only create a user with equal or fewer privileges

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?

20,000 on-line agents

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

The platform can scale to support the maximum number of agents.

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

Number of calls in dependent on call duration. A sustainable capacity of a VCS is 160 simultaneous calls. The platform can scale to support the maximum number of agents.

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

No set limit.

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

All agents, whether virtual or office workers are considered equals. The same 20,000 limit applies.

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

The real time reports track a rolling 24hr period.

Historical reports are stored on the platform for 45 days as standard. BT can store the historical data long term on its hosting platforms or Kodiak can choose to store historical data with their own storage solution.

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

No set limit.

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

No set limit. It should however be noted that the use of too many skills may disqualify any agent from responding to a call. The converse is that the use of too few skills would not utilize the agents according to their strengths thus diminishing potential gains in customer service.

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.**

A browser-based interface provides a real time view about information including queues, agents, and agent groups. The interface is a graphical interface that is accessible from any PC with an IP connection. Additionally, the database schema is open, enabling customers to create custom reports using standard report generation tools.

Reports can be filtered in numerous ways, e.g., by queue, agent, agent status, time, etc. Additionally, the database schema is completely open, and customers may create any desired report using any report generation tool. This also allows for tight integration with billing systems that are designed to keep track of minutes used for communication or other system data. The reporting is “cradle-to-grave”, so everything about the call is recorded, including IVR data, transfers among different locations, time in call, etc. This eliminates the need to integrate data from disparate systems that only track the information for their own part of the call. The reporting tool also verifies the user’s login permissions, and will only allow the user to view data for which s/he is authorized.

An HTML-based wallboard, which requires no proprietary hardware, is available for displaying various views of current activity to agents in the call center. This simulates the legacy wallboards in traditional call centers, but is more flexible because it runs on a standard PC and can be displayed on any computer display device. The wallboard can easily be customized to display selected data, and give alerts when pre-set thresholds are exceeded.

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

Y

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

Y

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

Y

5. What file formats can you export reports to?

- **CSV**
- **Crystal**
- **XLS**
- **DOC**
- **RTF**

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.**

The value that BT’s hosted MCC solution provides is often more than meets the eye and provides an easy entry for companies to transform their call centers into true contact centers. BT’s solution provides:

- Pay as you go model with cap-ex eliminated
- 24X7 network and platform management and service desk
- Managed network interconnects
- Firewalls and intrusion detection
- Software licenses & support costs
- Implementation support
- Testing of software upgrades before going live
- Training for tenant admins, supervisors and agents
- Daily back-up of data

Beyond the features and capabilities of MMC, it's significant to note that the MMC solution is interconnected / integrated with BT's global networks for both voice and IP. BT can provide a customer solution with single point of contact for their global contact center needs, including:

  - Global transport (Voice, IP, data)
  - Network hosted applications
  - Global support
  - Systems integration services
  - Outsourced solutions
  - IT consulting and implementation

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.**

The business model is based on simultaneous concurrent agent positions. As a global network provider the agents could be anywhere in the US or the world. If you have 300 agents in Singapore, 300 agents in NY and 300 agents in LA…but only 400 are logged in concurrently you pay for only 400 agent positions.
2. Is the system purchased through direct sale, resellers, and/or channel partners?

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

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

The assumption is that since they are a global company they are working 3 shifts of which the major traffic is during West Coast peak calling. The remote agents are assumed to be working during the off peak for off hours support. Therefore the maximum concurrent agents logged in is assumed to be 93 agents based on Erlang and Poisson tables.

The cost per agent vary depending upon the various media types – the assumption here is that the majority is voice traffic with IVR along with significant Email and Chat. Video is limited.

Cost (excluding transport) for fully equipped agents would be $14,000 per month and a one time install $10,000 installation that include initial scripting on the IVR and MCC platforms. CRM integration is considered separate but on average would price out in the mid – tens.

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

Maintenance and support is included in the rental.

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?

Two day on-site admin training course:

- USD 6000

One day on-site supervisor training:

- USD 3000
- Kodiak could use the Supervisors to train the agents

On-site agent training for 200 agents:

- Recommend 10 half day session with 20 attendees at each session
- USD 10000

VII. Vendor Information

1. How long have you been in business?

Although the company's (BT's) origins date from the late 19th century, British Telecommunications was incorporated as a public limited company (plc) on 1 April 1984. Initially all shares in the new plc were owned by the U.K. government, but in November 1984, 50.2 per cent of the new company was offered for sale to the public and employees. The company's transfer into the private sector continued in December 1991 when the government sold approximately half of its remaining holding of shares reducing its stake to 21.8 per cent. Virtually all the government's remaining shares were subsequently sold in a third flotation in July 1993. In July 1997 the new Labor government relinquished its Special Share ("Golden Share"), retained at the time of the flotations.

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

BT is one of the world's leading providers of communications solutions serving customers in Europe, the Americas and Asia Pacific. Its principal activities include IT and networking services, local, national and international telecommunications services, and higher-value broadband and internet products and services.

BT Global Services, one of BT's three lines of business, provides IT and networking services to meet the needs of multi-site organizations globally. BT Global Services operates in more than 130 countries and also offers international carrier services.

BT currently employs 100,000 people worldwide, with approximately 34,000 employees outside the UK, and has more than 22 million customers in over 150 countries.

3. How long has the product been shipping?

BT's hosted MCC solution has been available for two years.

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

Yes, although this is often not needed.

5. In how many cities do you provide onsite support?
BT can support its customers where ever they may be.