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 (interrogates 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

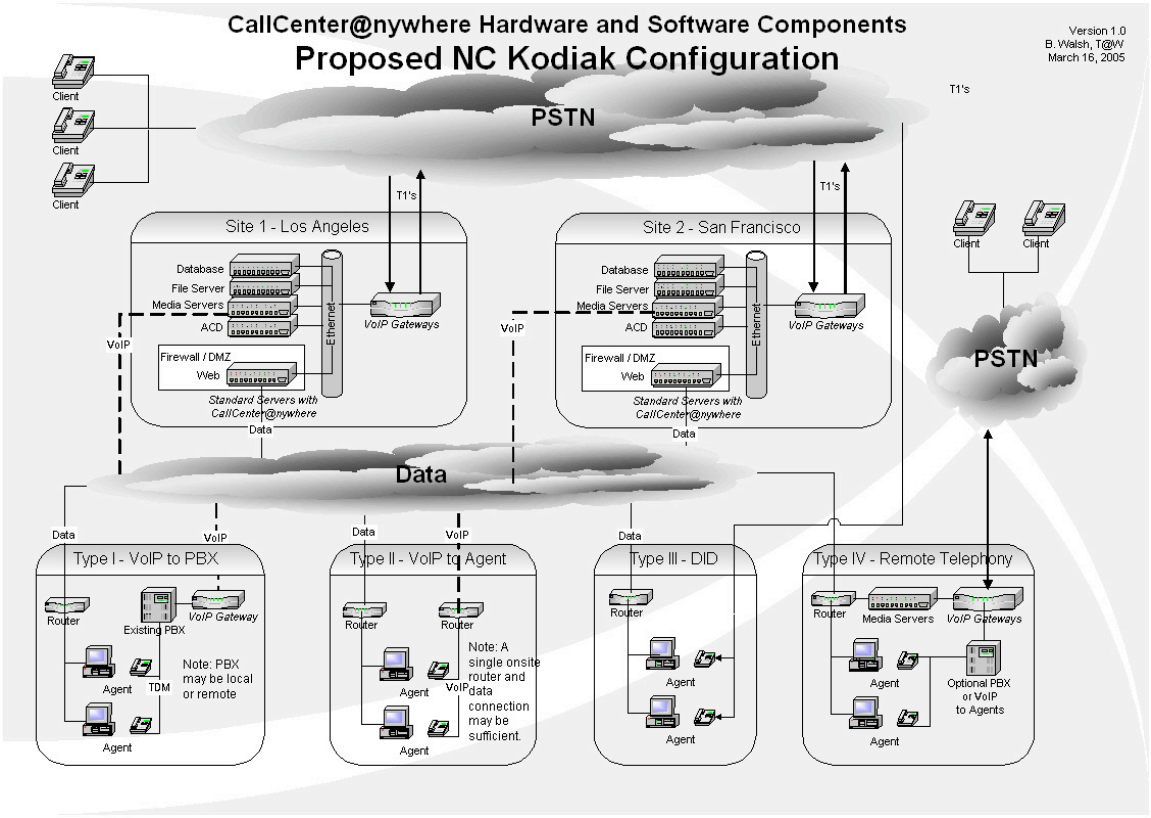
The proposed solutions will be graded on the following criteria:

A. General Architecture

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

To begin, thank you for the opportunity to submit this RFI for your consideration. Our responses are in dark blue italicized text within the original RFI document. Please address any questions to Brian Walsh at 858-410-3944, bwalsh@telephonyatwork.com.

Please refer to the following diagram, and the following notes:



Notes:

- *Mirrored and redundant hardware may be deployed as shown in the two main centers.*
- *Hardware (servers and gateways) is supplied by manufacturers such as HP and Cisco, and may be purchased as part of a turnkey solution.*
- *Software is Telephony@Work's CallCenterAnywhere, supported by MS SQL database and BEA WebLogic web servers.*
- *Gateways convert calls from TDM to VoIP for switching, recording and delivery.*
- *Call delivery types I to IV may be deployed simultaneously and independently, and may evolve over time:*

- *As shown in Type 1, calls may be delivered to agents using existing PBX's via gateways, either onsite or remotely.*
- *As shown in Type II, calls may be delivered directly to agent VoIP devices using SIP or H.323, G.711 or G.729, to hardphones or softphones.*
- *As shown in Type III, calls may be delivered to agents using DIDs such as Centrex, 1FB, home office or even cellphones.*
- *As shown in Type IV, a remote telephony server cluster may receive and deliver PSTN calls remotely, while being controlled by the central core servers. This deployment option would allow Death Valley to directly receive PSTN calls.*

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.

Telephony@Work's CallCenterAnywhere is a comprehensive and pre-integrated browser-based solution for contact centers that encompasses all forms of customer communication. The system was designed and built from the ground up to incorporate all contact center applications such as quality monitoring and recording, IVR, predictive/preview outbound dialing campaigns, and unified messaging. It provides all infrastructures for and applies skills-based routing to all types of media communication – voice, e-mail, and web.

The result is single system image – with a single interface for all applications and all locations. Unified queue, streamlined management, reduced infrastructure, and increased functionality are all made possible with the Integrated-By-Design platform.

For Kodiak's stated goal of improving call center operations, the browser-based deployment tool allows rapid, simple and reliable routing changes, advanced features and great flexibility. The overflow, multi-media, unified customer history and other capabilities will allow Kodiak to 'leapfrog' its competitors by adding outstanding and future-proof customer service capabilities to its existing infrastructure. Further, the flexibility to deploy VoIP, leased lines, VPNs and PSTN calls where and as needed, allows the third stated goal to reduce telecommunication costs to be addressed with agility and creativity.

The business objectives are addressed individually:

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.

As will be demonstrated throughout this document, as a softswitch-based ACD deploying standard VoIP gateways as a interface to the PSTN and existing TDM-based PBXs, CallCenterAnywhere is ideally suited to overlay an existing TDM network, while allowing complete flexibility to deliver VoIP to agents and callers in the future.

B. Use multimedia routing to send all inquiries to call center agents, whether they come in by voice, fax, e-mail, or Web.

Regardless of how customers arrive at the contact center, through voice, e-mail, web chat, fax, or voice message, they expect service that's consistent, timely, and hassle free. In the past, sophisticated routing rules only applied to voice calls arriving real-time at the call center. Today, companies are finding that other media contacts must also be handled as expertly and efficiently. CallCenterAnywhere allows users to design routing patterns based on business realities. For example, if there are callers waiting in queue to be handled, and your most important customer has just sent you an e-mail, whom do you handle first? System routing scenarios can be designed to support your business priorities, while not disrupting the overall handling of contacts.

C. Decrease costs by supporting voice and data on a single network

With appropriate Quality of Service provisions, and using customer-preferred technologies and vendors, CallCenterAnywhere allows single network data and voice deployment.

D. Eliminate toll charges between sites

As indicated in the included diagram in the previous section, toll charges may be eliminated between sites and to remote agents using VoIP.

E. Reduce infrastructure costs by enabling agents to work remotely
All CallCenterAnywhere's capabilities are enabled for operation in distributed environments so that enterprise call centers could blend local, branch-office and remote agents in one seamless infrastructure. CallCenterAnywhere agents need only a telephone, PC and internet connection to fully participate in the call center, no matter their location
.

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.

Telephony@Work's CallCenterAnywhere is a comprehensive browser-based multimedia contact center solution for service providers. CallCenterAnywhere is in general commercial deployment in top-tier service provider networks such as MCI. It encompasses and unifies all communications channels (phone/ fax/voicemail/email/chat/web-collaboration/voice-over-web/web-callback calls) and delivers those communications with world-class ACD discipline – including weighted skills-based routing, a unified queue and consistent customer priority business rules across media channels.

Telephony@Work's ACD is fully unified to encompass ALL forms of communication with weighted skills-based routing, consistent customer priority business rules and a completely unified queue (with the option of prioritizing different media types over others in the queue). Other vendors often cannot provide skills-based routing of voicemail, faxes, etc.

CallCenterAnywhere's advanced queuing features drastically reduces abandoned calls and lower toll charges incurred while callers wait in queue. Callers are advised of estimated wait times and have the option of continuing to wait on-hold, leaving a voicemail message or entering a telephone number to receive a callback without sacrificing their call priority (a virtual queue). Callers who select a callback maintain their priority in the queue and are advised of the estimated time before the callback will take place.

Regardless of how customers arrive at the contact center, through voice, e-mail, web chat, fax, or voice message, they expect service that's consistent, timely, and hassle free. In the past, sophisticated routing rules only applied to voice calls arriving real-time at the call center. Today, companies are finding that other media contacts must also be handled as expertly and efficiently.

CallCenterAnywhere allows users to design routing patterns based on business realities. For example, if there are callers waiting in queue to be handled, and your most important customer has just sent you an e-mail, whom do you handle first? System routing scenarios can be designed to support your business priorities, while not disrupting the overall handling of contacts.

At the core of optimized multi-media routing is the ability to identify any contact and route it based on who it is and the current activity levels in the contact center. CallCenterAnywhere processes all media types through a single queue. Once contacts are identified, business priorities set up by the user are applied to determine who is handled first. And with a single queue, consolidated reporting on all media types is a reality.

Business rules such as recording, overflow, monitoring, reporting, escalation, schedules, skills-based routing, prioritization, call treatment based on originating caller ID or area code and numerous other capabilities are provisionable, and changeable, within minutes by non-technical staff, and immediately apply to all affected agents throughout the system.

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.

At the core of CallCenterAnywhere's optimized multi-media routing is the ability to identify any contact and route it based on who it is and the current activity levels in the contact center. CallCenterAnywhere processes all media types through a single queue. Once contacts are identified, business priorities set up by the user are applied to determine who is handled first. And with a single queue, consolidated reporting on all media types is a reality.

Routing rules and controls are identical across all media types. Telephony@Work's CallCenterAnywhere is a comprehensive and pre-integrated browser-based solution for contact centers that encompasses all forms of customer communication. Any agent no matter their location may participate in any queue, so callers are delivered to the best available agent anywhere in the enterprise.

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

Yes. Any agent, in any location, may belong to any workgroup, and participate fully in that workgroup according to its business rules.

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

CallCenterAnywhere provides the capability of uniting multiple geographically dispersed sites into one contact center. The system scales to carrier levels while providing contact centers with the ability to centralize technology and to support an unlimited number of locations, remote agents, and telecommuters around the globe. It no longer matters where agents with specialized skills are located. CallCenterAnywhere is location independent - when an agent logs into the contact center over their web browser, the system immediately knows their profile and begins to route contacts to them.

The network-based architecture of the system allows provisioning from any location on the network by an authorized administrator or supervisor. Network connectivity allows supervisors to observe agent activity, including call monitoring and coaching, regardless of where the agent is located. A centralized data repository provides unified reporting across all sites and all media types.

Provisioning CallCenterAnywhere is easy. Pull down menus provide needs analysis questions, and designing your workgroups and call flows is simply a matter of answering the questions. Simple provisioning and changes don't require programming. A secure browser interface is used to make configuration changes, which apply immediately across all agents, workgroups and projects. Screen captures in the following sections show samples of this unique and powerful interface.

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.

No, pre-call routing options are not required, but they may be deployed where advantageous.

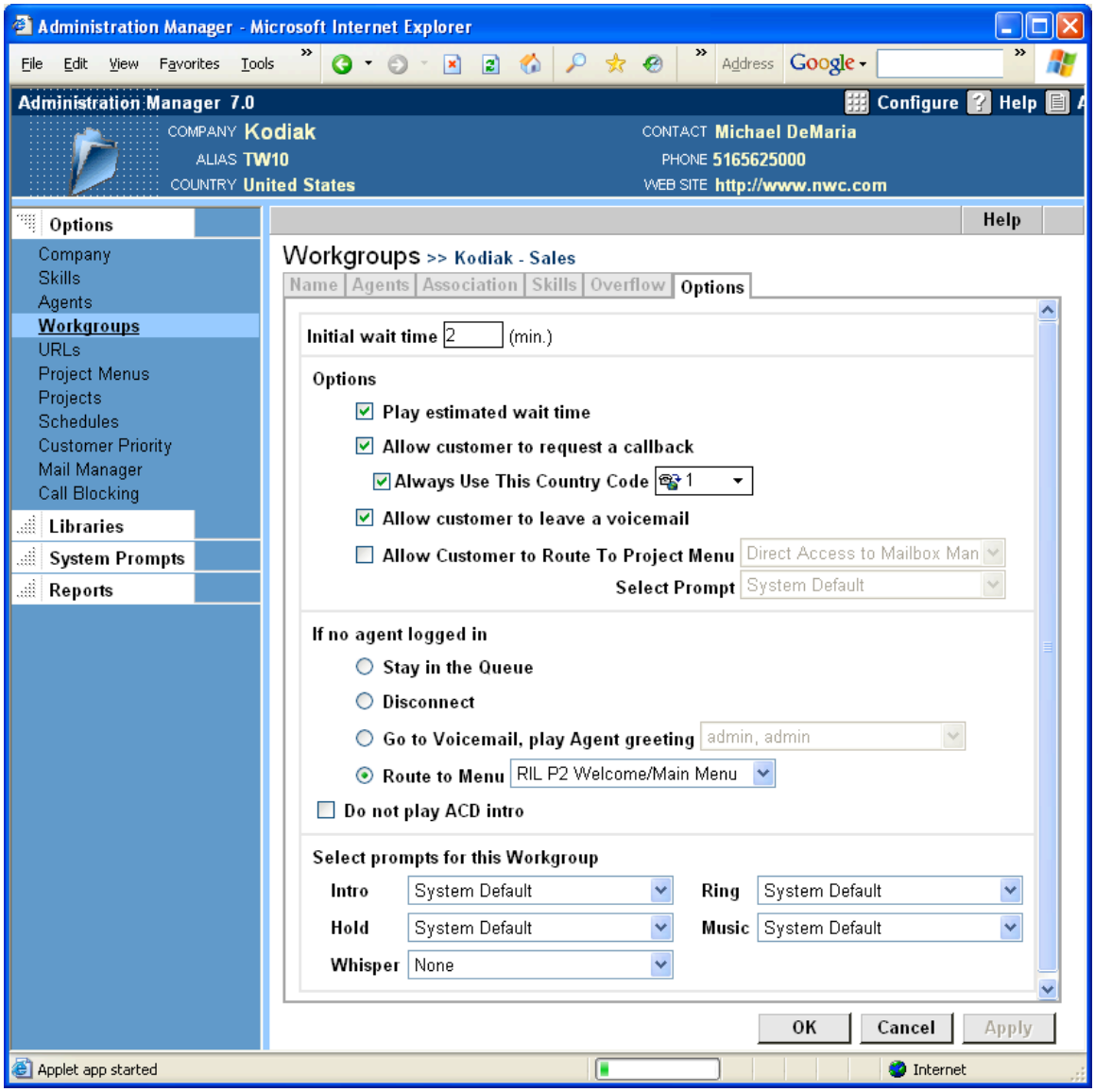
It is first important to note that each inbound call from a client terminates where it is delivered from the PSTN. CallCenterAnywhere then places an outbound call to the assigned agent and bridges the two call legs together for control, recording, supervision and reporting. Agents may also work off-hook.

In a simple example, all calls could be delivered to one location, perhaps Los Angeles, and then sent to other agents at other locations as required. With 150 of the 250 agents located elsewhere, some 60% of all outbound call legs to agents would need to be interflowed in this case. The ability to use VoIP for tollfree provides many cost-saving options.

However, some simple and inexpensive carrier routing options, such as Call Allocator, may be leveraged for significant savings. For example, if the Los Angeles and San Francisco center have equal numbers of agents handling identical types of calls to a single toll free number, the inbound calls could be allocated by the carrier such that 50% of the calls go to each site. The onsite telephony servers would then request a local agent if available, sending the call to the other location only when required. In this approach, perhaps 90% of calls may be serviced where they are delivered; the interflow of the remaining 10% allows optimal utilization of agent resources. The interflow may be performed via VoIP for toll bypass.

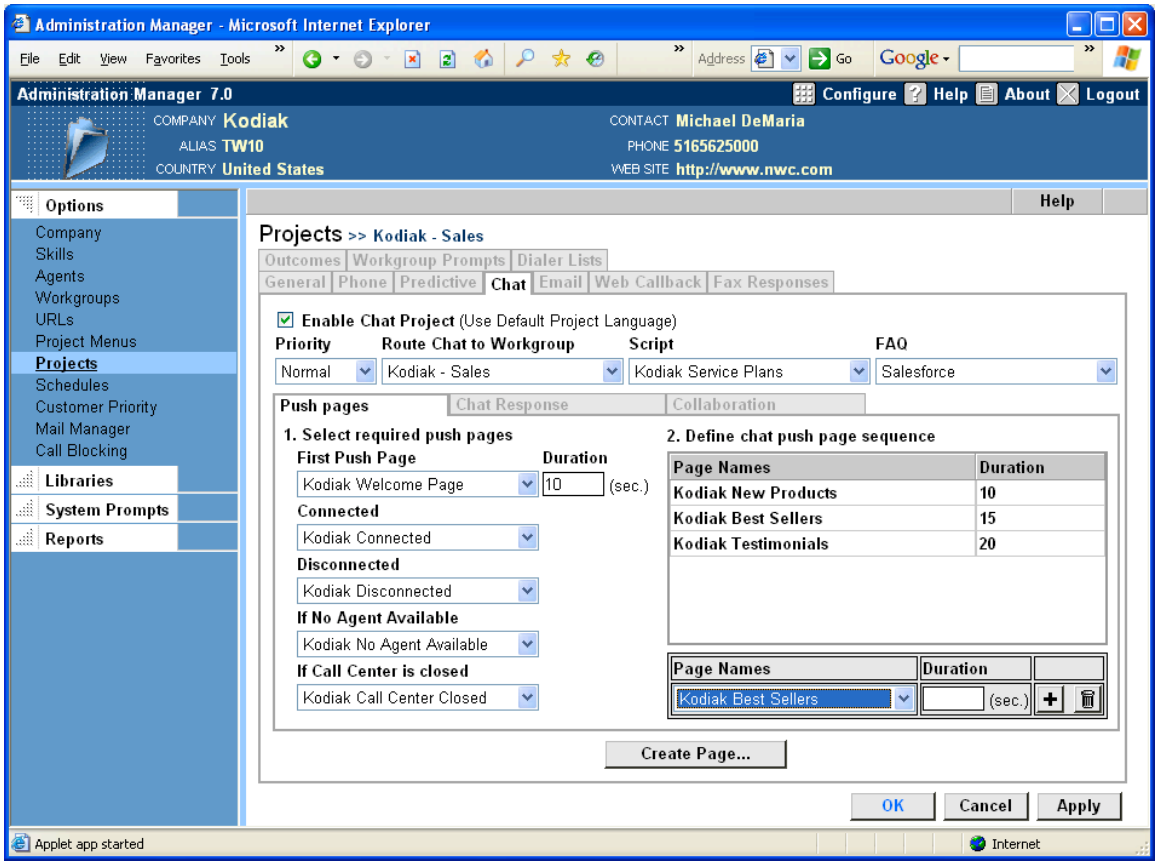
6. When real-time response is indicted by voice and Web contacts, describe the system's ability to inform customers of their positions in the queue and the time remaining before a response? Limit your answer to 250 words.

CallCenterAnywhere's advanced phone queuing features drastically reduce abandoned calls. Callers may be advised of estimated wait times upon entering a queue. This option is provisioned with a single check box, and can be turned on or off for a queue in a matter of seconds by any authorized user in a matter of seconds. As a concrete example of this, please refer to the follow screen capture, and note the first check box.



In addition, administrators may provision the option to allow callers to wait on-hold, leave a voicemail message or enter a telephone number to receive a callback (all enabled by the administrator's interface using simple check boxes during setup). Callers who select a callback maintain their priority in the queue and are advised of the estimated time before the callback will take place. Position in queue is not announced.

The following screen capture shows a web-chat project being set up. Note how the administrator chooses the web pages to push at various stages of the process, including the 'First Push Page'. This initial page may display estimated wait time and queue position by accessing available system variables. The second area to the lower right allows a screen show of rotating pages to be displayed to the caller while awaiting an agent.



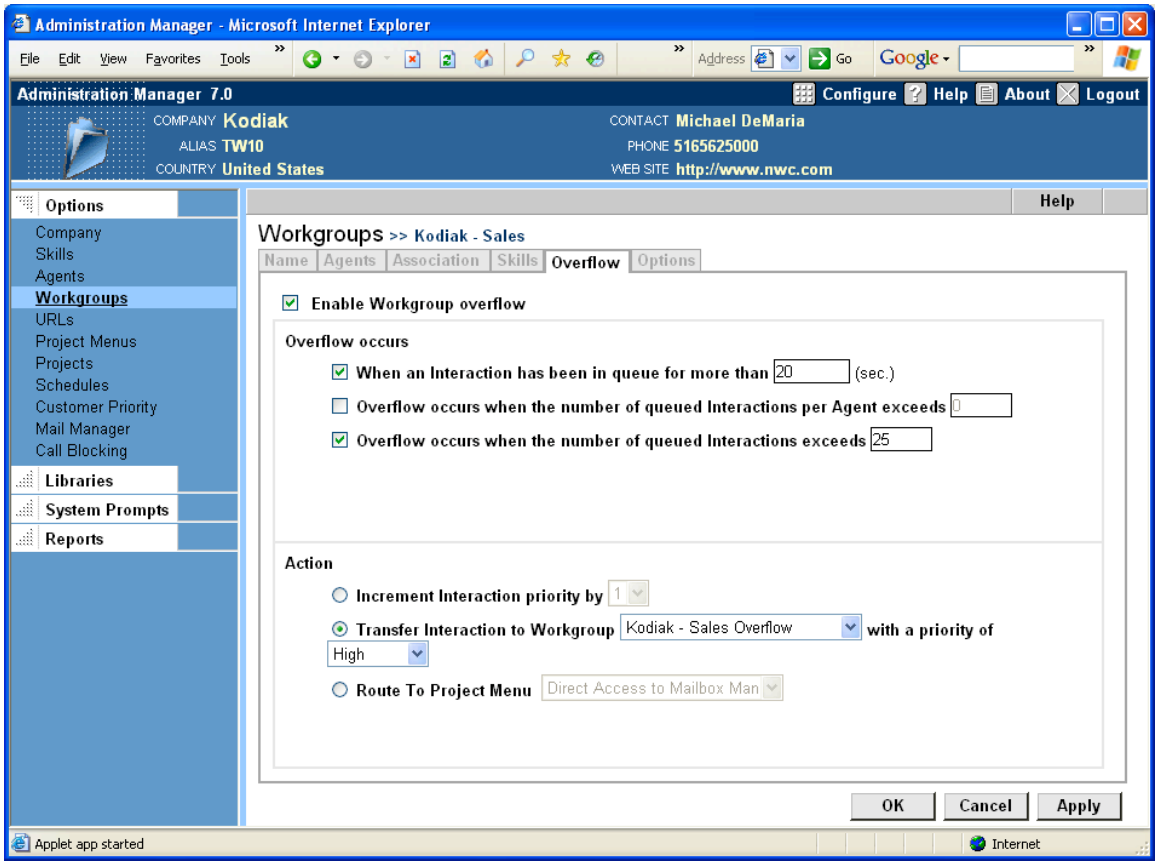
C. Queuing
(prioritization of routed contacts)

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

Yes, as shown in the following screen capture, calls destined for a queue/workgroup may be overflowed under triggering conditions (time in queue and number of queued calls in this example), and assigned to another queue. Note the provisioning paradigm: a simple plain-English browser interface using checkboxes, radio buttons, text boxes and drop-drown lists. Anyone who can order a book online can setup and modify the business rules.

Please refer to the first screen capture in the previous section to see the options that may be taken in a call is to be assigned to a queue that contains no available agents.

(Note that for the remainder of this RFI response we will not always present the exact mechanism used to deploy an option, but these few concrete examples should illustrate just how unique and simple CallCenterAnywhere is to deploy and modify. A live demonstration is invariably the best way to understand the full flexibility, power and ease-of-use of our offering, and we would be delighted to provide a one-hour web-based demo at the reviewer's convenience.)



(Note: Question 2 is missing in the copy of the RFI we received)

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

Yes, as indicated in the previous response.

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

Yes, according to call or caller priority, media type, or supervisor intervention.

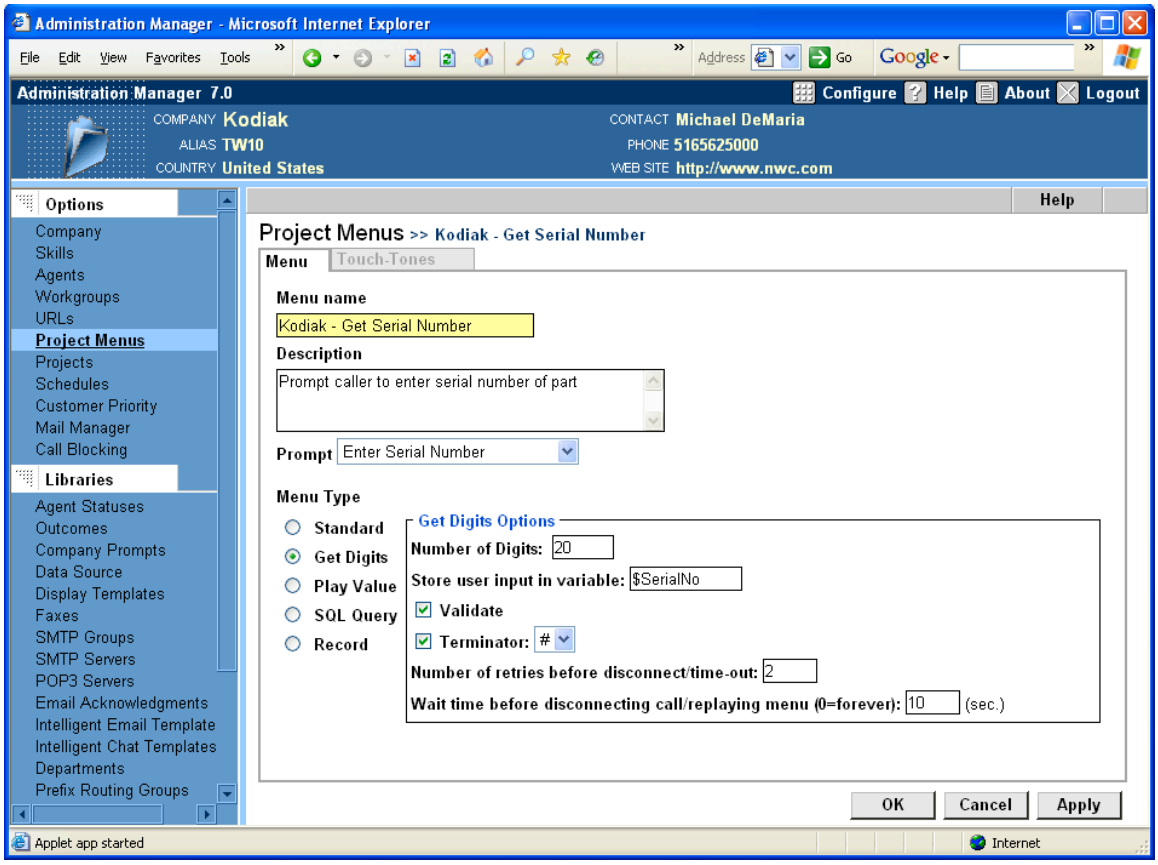
5. Can contacts select an IVR self-service module and return to their place in the queue to talk with a Kodiak customer service, sales, or support agent? Y/N

Yes, callers may opt to attempt self-service and be permitted to re-queue at whatever priority position deemed appropriate by the administrator during set-up.

Please refer to the first screen capture in this document, where the 'Allow Customer to Route To Project Menu' provides optional caller access to self-service menus, and the previous screen capture where business rules may be set to automatically overflow to self-service menus that the caller may have initially bypassed.

The following screen capture shows a sample of a self-service menu, where a caller may be prompted to enter a serial number. In this example, the prompt 'Enter Serial Number' is played, the IVR waits for the caller to enter the digits (which are pound-terminated), validates the number back to the caller, and stores the number in the variable `$SerialNo`*. Note the other menu types*

to the left, where the serial number may be used in SQL Query, and where the results of that query may be played to the caller using a Play Value menu type.



D. Enterprise Integration

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

CallCenterAnywhere may deliver calls to agents using almost any PBX, because the connection to the PBX is done with a simple T1 connection cable. No additional signaling is required because of the way CallCenterAnywhere front-ends all calls. The T1 "drop-and-insert" configuration will replace the PSTN T1s connected to the PBX with ones from the CallCenterAnywhere-controlled gateway. Those replacement T1's may use in-band (E&M) or out-of-band (PRI) signaling.

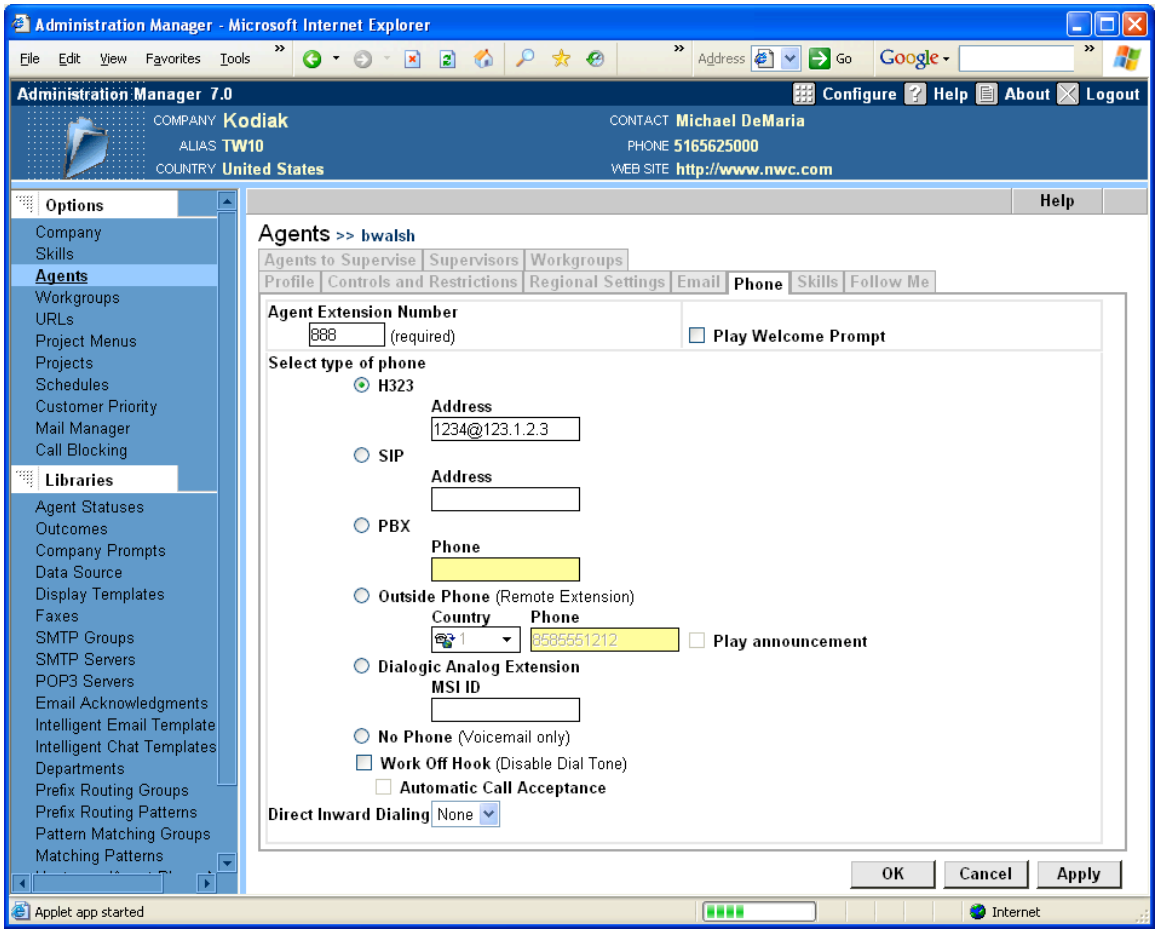
2. List the IP PBX switches you support by vendor and model.

Similar to the previous response, CallCenterAnywhere may deliver calls to agents using almost any IP-PBX, in one of two ways.

The less-desirable, but 'lowest common denominator' approach, is to deliver calls as TDM as described in the previous response.

The preferred approach is to use H.323 or SIP. CallCenterAnywhere deploys a version of Radvision's VoIP stacks for both these protocols, with the rights to modify the source code if required. Most IP-PBXs will accept H.323 or SIP calls natively, even if they use proprietor internal call setup protocols.

An example is Cisco's CallManager, which may use the Skinny protocol internally. CallCenterAnywhere is currently deployed in a number of sites where calls to agents are delivered via Cisco's CallManager. In this case, the agent will be set up to have calls delivered to their IP phone by sending calls to their extension at the IP address of the CallManager gateway (see following screen capture for an example). Here, CallCenterAnywhere places an H.323 call to the CallManager gateway at 123.1.2.3 requesting the user at extension 1234. CallManager finds the agent's current telephony device and uses Skinny to set up a call, negotiating a suitable codec. Once the call is setup, the RTP call flow occurs directly between the CallCenterAnywhere-controlled gateway and the agent's IP phone, bypassing the CallManager gateway.



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

The response is similar to that for PBX – CallCenterAnywhere can deliver calls through virtually any ACD, with the ACD now working as a basic PBX for call delivery. Agent selection and call control is still performed by CallCenterAnywhere.

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

CallCenterAnywhere includes its own advanced auto-attendant and capable IVR system. Part of that IVR capability is the ability to pass control to, and accept control from, external IVR systems. Numerous options exist to support most external IVR systems, passing data in-band, out-of band, via XML or via custom-programmed scripts.

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

CallCenterAnywhere is flexible enough to integrate with a traditional PBX or replace it entirely. PBX features are built-in, allowing office workers to place and receive calls at their own extension and create conference calls. Unified messaging allows the retrieval of voice mail messages from the desktop. Utilizing the "follow-me" feature, workers can designate off-site phone numbers, such as cell phones or home phones, where calls will be sent when they are not in the office.

The features supported, or a substantial equivalent, are indicated here:

_X_ Authorization codes
_X_ Automatic callback
_X_ Add-on conference
_X_ Call waiting
__ Paging
_X_ Hoteling
_X_ Automatic camp-on
_X_ Automatic alternate routing
_X_ Trunk callback queuing
_X_ Uniform dial plan
_X_ Night service
__ E911 Support
_X_ Class of service
_X_ Class of restriction
__ Intercom groups
__ Group paging
_X_ 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).

Cisco (VG2XX, 17XX, 26XX, 36XX, 53XX, 54XX) Quintum (CMS and DX series) and Audocodes (Mediant) have been deployed with both H.323 and SIP. Other standards-compliant manufacturers are also be supportable.

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.

CallCenterAnywhere's support of open standards allows Kodiak to select and deploy its preferred VoIP provider if other than the recommended options listed in the previous response, following a QA review by Tellphony@Work.

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

___ No (answer question 10)
_X_ Yes, the following packages are supported:
_X_ IBM Domino/Notes
_X_ MS-Exchange/Outlook
_X_ Novell Groupwise
_X_ Other (Please specify)

Agents may continue to use their preferred messaging and/or collaboration package. CallCenterAnywhere will deliver inbound unified messages (email, fax, voicemail) to the agent's existing inboxes. Further, CallCenterAnywhere's remote screen monitoring capabilities allows supervisors the ability to monitor other packages for appropriate use.

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.**

N/A.

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

___ No (answer question 11)
_X_ Yes, the following packages are supported:
_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)

We have confirmed integration to the packages listed because their continued use for outbound fax from agent desktops is not affected by the use of CallCenterAnywhere. Inbound fax may optionally be performed by the existing fax server package as it is used today, or by having the existing fax server send received faxes as an email attachment to an email routing project within CallCenterAnywhere.

Alternatively, inbound faxes may be directed to a CallCenterAnywhere fax project, where they are automatically converted to TIFF files once received and attached to email routed to a particular project. The receiving agent views the fax file attachment with any TIFF file viewer, such as the Windows Picture and Fax Viewer included with recent Windows operating systems

CallCenterAnywhere also has built-in outbound fax capabilities. An agent can send a pre-defined fax document from the desktop without direct agent fax capability as an inherent ability of the system. Administrators upload fax documents into a library, and make them available to agents. Once the fax request is delivered to the agent, the agent sends the requested fax directly from his or her desktop using the system. Information provided by the customer (including ANI or information included in a voicemail) may be used by the agent to enter a new customer record, associate the request with an existing customer, schedule a follow-up call, etc.

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.**

N/A.

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)

BEA WebLogic is the recommended web server for the session server component of the CallCenterAnywhere system. The CallCenterAnywhere system can push web pages to agents and callers, and allow chat and web callback sessions, using the listed and other web servers.

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?

The Predictive dialer is a fully integrated component of CallCenterAnywhere, allowing for true call blending.

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

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

The backend CallCenterAnywhere servers may use the listed operating systems, including Apple OS-X.

The agent desktop uses Internet Explorer 5.5 or later.

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)

CallCenterAnywhere may pull and push screen pop and related data to and from any of the listed or other ODBC-compliant databases. CallCenterAnywhere maintains is own configuration information on MS-SQL or Oracle.

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

The database may be supplied by Telephony@Work, or the customer may choose to use an existing MS-SQL or Oracle database server.

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)

CallCenterAnywhere provides numerous open integration points to systems back-end systems. Extensive integrations with Siebel and Peoplesoft have been undertaken; and these connectors are available. As described further in Response 3 of the next section, CallCenterAnywhere provides several integration options for back-end systems.

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

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

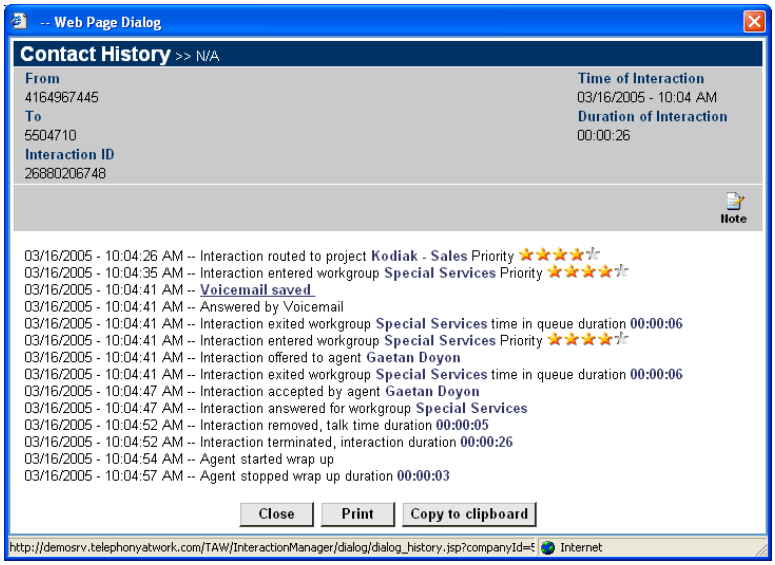
The vast majority of daily administration is performed with the administrator's browser interface shown earlier. Some hardware-based configuration is performed with a 32-bit application.

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.**

The following screen capture shows the level of detail available to agents during and after a call. Because CallCenterAnywhere handles each interaction from cradle to grave, no matter the point of origin, the call detail record includes each action associated with a call, included notes, transcripts, recordings, and transfers. The following response address other associated data.

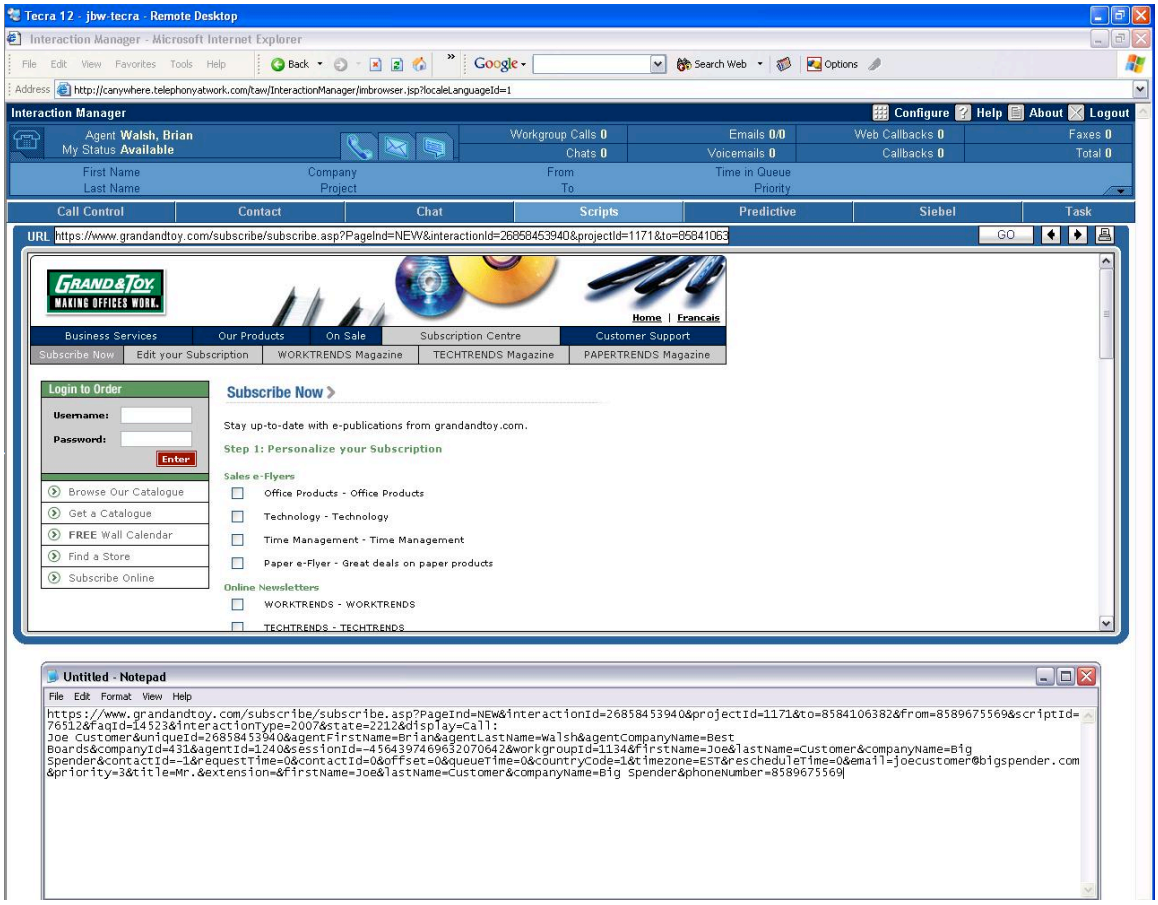


2. Describe how the call center application integrates with agent desktops for efficient customer account management. For example, does the CTI component have application programming interfaces (APIs) to applications, or will custom development be necessary? **Limit your answer to 300 words and include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

When a call is received, the Interaction Manager GUI provides agents with screen pops. Agents can see caller information based on their ANI or originating email address, as well as information associated with the project/campaign called, based on the DNIS or destination email address. This information appears on the main agent screen. If the contact is known, the contact information appears under the Contact tab. Two URL links are delivered linked to FAQ's, scripts, order entry screens, CRM data or any other HTML information are also provided based on the workgroup queue servicing the call, or the identity of the caller, or both. This feature adds tremendous flexibility to the system for working with other existing or future external packages.

Additionally, the Interaction Manager provides a "Custom" button that the administrator may activate and use to display customized content and access information about the incoming interaction. The administrator may then pass information about CallCenterAnywhere interactions to other applications such as a CRM or Help Desk, integrating CallCenterAnywhere with the chosen business applications.

In the following screen capture, notice the URL pushed to the agent interface, as associated with the particular inbound call type. Appended to the URL is data associated with the call, caller and agent. This URL was cut and paste into a untitled Notepad text file, also visible, which shows the extent of the presented data. Kodiak is free to use any URL to receive and present appropriate data to the agent via this mechanism.



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

As described in the previous section, CallCenterAnywhere can trigger most HTML applications with relevant parameters. A similar mechanism may be used for 32-bit/64-bit application. CallCenterAnywhere includes an API for further integrations options, supports XML and SOAP, and publishes a data dictionary and physical model for data integration.

Using these techniques, some typical integrations that have been performed to date include:

- *Peoplesoft*
- *Peregrine*
- *Siebel*
- *Remedy*
- *Multi/Insurance Specific*
- *MS CRM*
- *Visual FoxPro CRM*
- *SAP*
- *Salesforce*

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

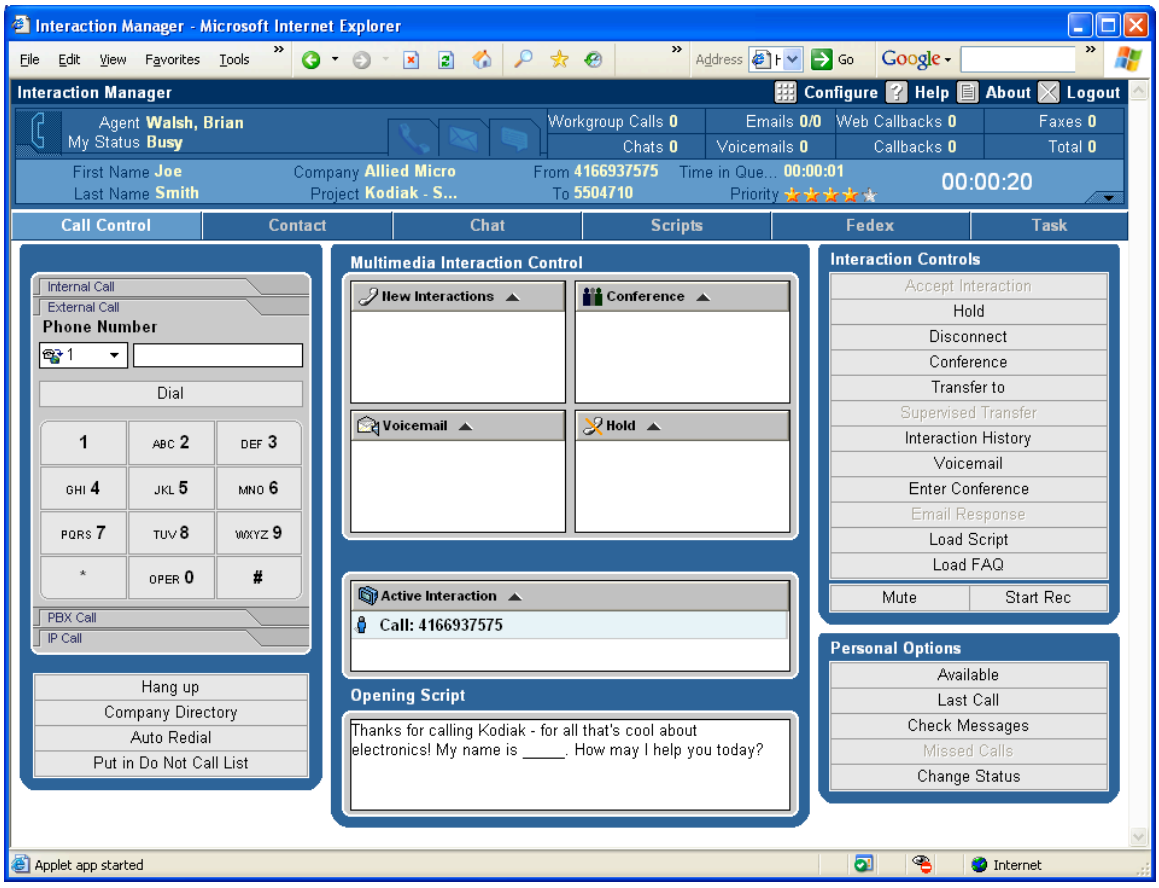
Telephony@Work also has key relationships with Nortel, SBC, Microsoft, Siebel, and Left Bank.

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

Please reference response for Question 3.

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.**

When a call arrives, information about the caller, call, queue and project appear on the agent interface (see graphic below). An opening text script also appears for that type of call.



Selecting the Contact tab provides addition information about the caller, including access to past interactions. Clicking on the CRM and Scripts tab launches additional tabs, windows or applications as defined in the business rules for that project.

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?

Remote agents are supported; in fact, since all agents access the system via a web-browser, the concept of a local vs. a remote agent does not apply in the traditional sense – the physical location of the agent is actually irrelevant. The agents may be located anywhere as long as they have a web browser and IP access (LAN, WAN, Internet, intranet, extranet), and acceptable telephony. The agent uses the Configure option of the softphone to identify to CallCenterAnywhere the telephone number or VoIP address to which calls should be delivered.

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)
___ TAPI (Telephone Application Programming Interface)
___ TSAPI (Telephone Services API)
_X_ VoiceXML
_X_ XML
_X_ Other (Please specify)

The commonly employed standards are selected above. The use of an option within CallCenterAnywhere to deploy separately compiled code allows the other CTI listed standards to be supported if desired.

A brief summary of the standards used within the CallCenterAnywhere software and its deployment follows.

- *HTML, XML, JSP*
- *HTTP, HTTPS*
- *FTP*
- *SNMP, POP3, MAPI*
- *TCP/IP, UDP/IP, RSVP, RSP*
- *H.323, SIP, T.120*
- *JDBC, ODBC*
- *C/C++, Java*
- *WAV, MP3*
- *POSIX, Windows NT/2000*

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:

CallCenterAnywhere provides all the functionality described in this response to any user, whether onsite with the equipment or working at home.

2. Provide per employee price for telecommuting product:

Telecommuting capabilities are included in the product quotation in Section J.

3. Provide a diagram of your proposed telecommuting solution.

The diagram in Section A shows remote workers based at home, as a Type III call.

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

Home-based CallCenterAnywhere users may access the main CallCenterAnywhere web servers located at Kodiak's Los Angeles and San Francisco locations via HTTP, HTTPS or VPN. Kodiak need only provide secure access to required back-end systems, typically over a secure VPN. CallCenterAnywhere may use the same VPN connection.

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?

CallCenterAnywhere has been tested for tens of thousands of users, and designed for hundreds of thousands. Telephony@Work has tested in a lab environment to 50,000 users per workgroup. This capacity has been substantially validated by one of our largest service provider customers, which has tested the capacity to 20,000 agents, which was sufficient for their needs. We are not aware of any practical limits to the scalability of the system.

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

No practical limit (i.e. a minimum of tens of thousands).

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

No practical limit (i.e. a minimum of hundreds of thousands).

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

No practical limit (i.e. a minimum of hundreds of thousands).

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

No practical limit (i.e. a minimum of tens of thousands).

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

No practical limit. The database and web servers that provide reporting may be scaled as required.

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

There is no practical limit (i.e. a minimum of thousands).

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

No practical limit (i.e. a minimum of thousands).

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.**

CallCenterAnywhere included extensive built-in realtime supervisory monitoring and control, accessed via a secure web-browser. A realtime agent status display provides supervisors to leverage call monitoring, whisper coaching and barge-in/take-over capabilities as well as the ability to lock out agents and view/take over agent screens in the supervisor's browser window.

Call recording is included on both an on-demand and scheduled basis; with conversion to MP3 to minimize storage requirements / streaming capability via internet browser accessing ftp-server-based storage.

Real-time reporting includes:

- *Quality Monitoring database populated with random and/or supervisor initiated recordings*
- *Real-time statistics spanning global to agent-level views*
- *Color-coded threshold alarms for interactions*
- *Real-time view into queue and agent activity*
- *Allows supervisors to monitor important statistics such as:*
  - *Calls waiting*
  - *Calls connected*
  - *Longest call waiting*
  - *Longest call connected*
  - *Agents logged in*
  - *Agents available*
  - *Average talk time*
  - *Number of calls*
  - *Abandon rates*
  - *Service level*

Supervisor Monitoring Capabilities include:

- *Silent Monitoring – supervisors may select an active call and "listen in"*
- *Coach – supervisors may whisper coach the agent without the customer hearing.*
- *Join – Supervisors may join an agent to service a call in progress.*
- *Record – supervisors may select an active call and choose to record that call*
- *Message – supervisor may send a message to the agents in their workgroups*
- *Chat – supervisor can send text chat to a specific agent*
- *View – supervisor may view the agents desktop and take remote control of their applications work space*

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?

HTML is the native format; PDF and Excel are also supported.

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.**

Telephony@Work was founded with the mission of creating the first carrier-class contact center platform for enterprises and service providers. The company's vision is to drive the democratization of contact center capabilities by helping all companies provide world-class service to their customers over the phone, fax and Internet.

This vision is manifested in technology that is Integrated-By-Design to provide benefits far beyond the reliability, scalability and efficiency limitations of the multi-vendor / systems integration approach - benefits that help companies increase efficiency and customer satisfaction, reduce technology adoption costs and operating expenses, increase revenue and enjoy carrier-class scalability and up-time.

CallCenterAnywhere offers compelling value for enterprise contact centers: infrastructure that installs faster, cheaper and with greater reliability than enterprise-grade technologies. The "carrier-class" value proposition of this enterprise offering also includes the Service Provider Edition's unique, patent-pending "hot-backup" capabilities that keep communications alive even if individual servers fail - a milestone in contact center technology. It was this revolutionary approach to fault tolerance that led the Pelorus Group, one of the industry's most respected independent researchers, to twice rank CallCenterAnywhere first among all vendors in contact center technology reliability.

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.**

Telephony@Work sells CallCenterAnywhere direct to enterprise customers, and via reseller arrangements with VARs. The service provider edition is sold to carriers and application service providers such as MCI, TELUS, Telstra, Siebel and Promero, who offer hosted CallCenterAnywhere to their subscriber customers.

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

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

As described in the previous response, the hosted option is somewhat unique among other vendors, and validates CallCenterAnywhere's ease-of-use, robustness and scalability.

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

Based on the information provided, software costs would be approximately $600,000, hardware $150,000, installation $35,000, training $15,000, for a total of $800,000. This assumes sufficient capacity to deliver calls to agents using the existing PBXs initially. Kodiak may transition to VoIP with no extra call center equipment.

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

Annual maintenance would be $120,000.

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?

The training costs would be $15,000.

VII. Vendor Information

1. How long have you been in business?

Since 1997.

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

Approximately 80 at the present time (up from 45 two years ago).

3. How long has the product been shipping?

Since 1998, currently on Version 7.

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

Yes.

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

Local onsite support is provided by IBM Global Services in hundreds of locations internationally.