SIEMENS

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.

√ Product is available to customers on or after **March 18, 2005** and is not in beta form
√ Support for both TDM (circuit) and IP (packet) switched voice networks
√ Multimedia routing for voice, e-mail, Web, and facsimile communications

_√_ Call blending: support inbound and outbound calling
_√_ Look-ahead routing logic (interrogate queues and estimate call-wait time)
_√_ Priority queuing
_√_ Queue escalation
_√_ 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

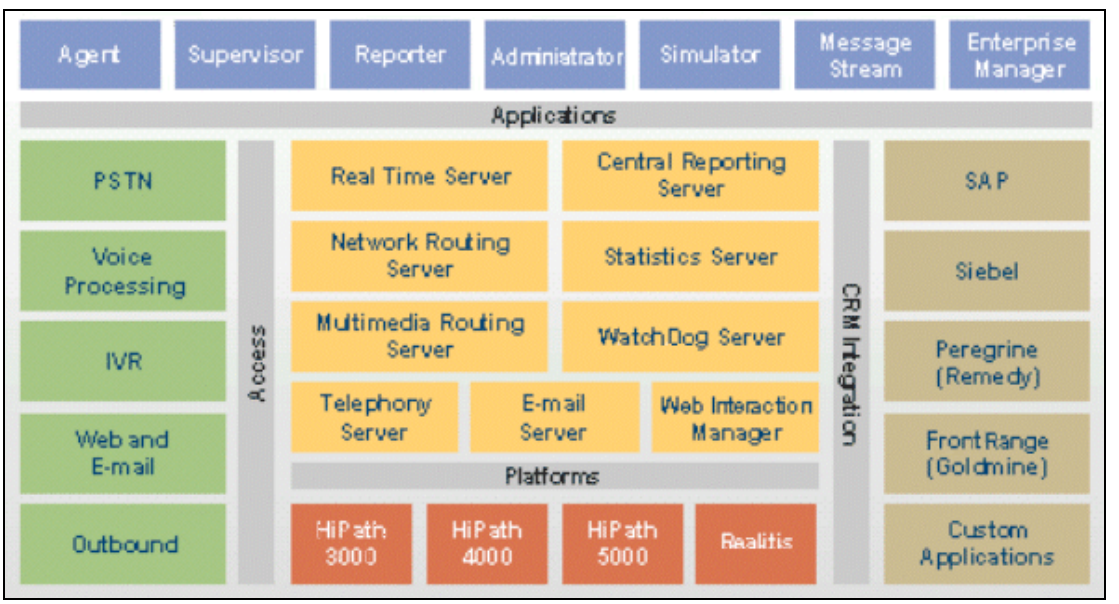
The proposed solutions will be graded on the following criteria:

A. General Architecture

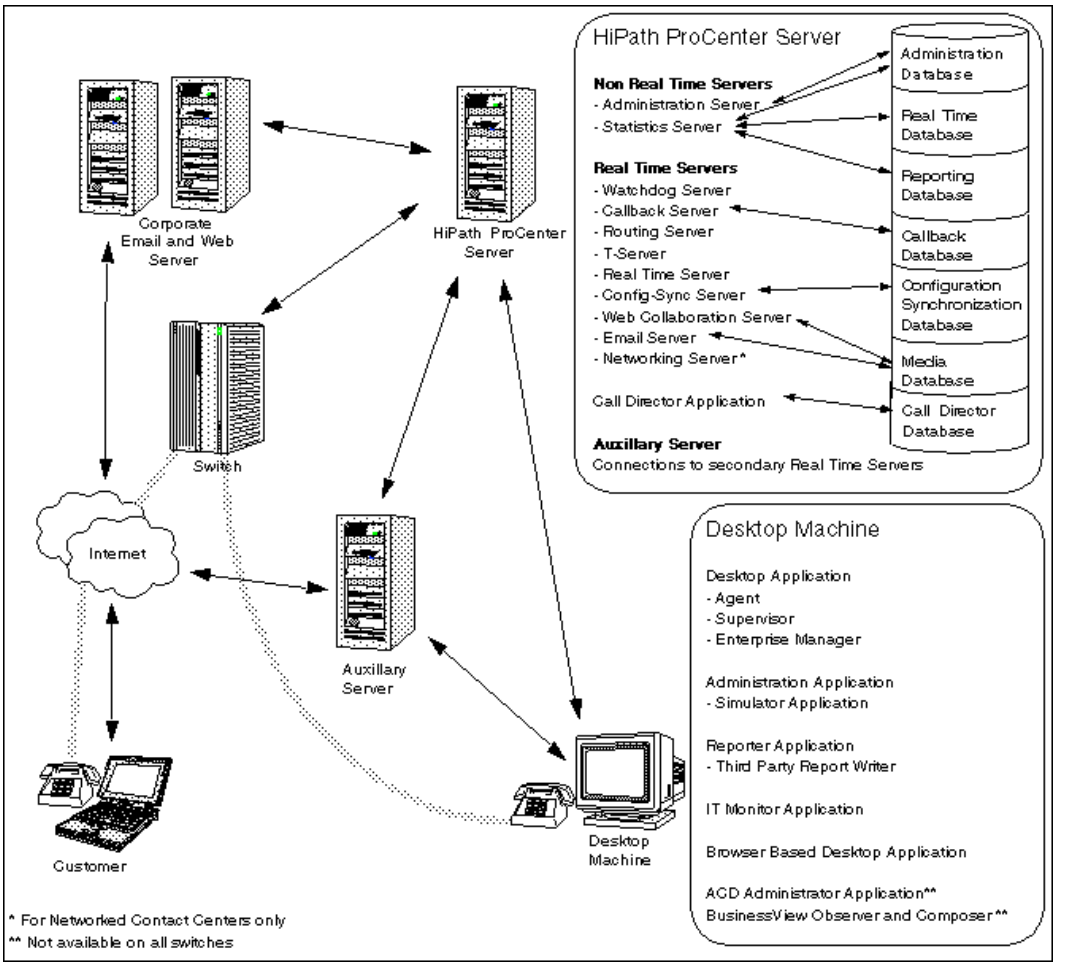
1. Provide a diagram of major hardware and software components and how they are interrelated and interconnected.

RESPONSE:

The HiPath ProCenter Suite consists of software that performs call center operations and a set of applications configured to operate at a site.



The HiPath ProCenter solution is based on server architecture. There are multiple software servers that run the various processes in the system. The application receives events and requests services from the switch platform via a dedicated CTI link. The CTI application is included as part of the HiPath ProCenter solution. The following picture depicts a sample scenario for a HiPath 4000 and the relationship between the components in the architecture:



Note: The term "server" refers to a logical software server. A description of the servers that may be involved appears below.

HiPath ProCenter servers can be classified as non-real-time, real-time and auxiliary, depending on their function:

- Non-real-time HiPath ProCenter servers that support administration and reporting (administration and statistics servers)
- Real-time HiPath ProCenter servers such as:
  - Config synch server
  - Watchdog servers
  - Telephony server (T-server)
  - Real-time servers
  - Email server
  - Network routing server
  - Central Reporting servers
  - Callback server
  - Web collaboration server
- Auxiliary servers that provide connectivity to real-time servers

The Call Director application consists of a software component and a hardware component, both of which reside under the skins of the HiPath ProCenter Routing Server.

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.

RESPONSE:

HiPath ProCenter Suites are the premier offering within the HiPath ProCenter portfolio, a grouping of contact center and eCRM applications and services. The HiPath ProCenter portfolio is a part of a larger applications strategy, which helps enterprise customers move from standard and disparate communication channels to unified, IP-Based communications. This results in stronger customer relationships and overall increased efficiency of enterprise workflows and its knowledge workers.

The HiPath ProCenter Advanced Suite, recommended for Kodiak's business requirements, is a full-featured, multimedia offering optimized for contact centers, regardless of size or complexity. The solution operates in circuit, packet or hybrid infrastructure environments and protects customer investments in technology.

To help businesses optimize their customer relationship management strategy, HiPath ProCenter Suites address four key challenges:

- **Relationship Value:** Capturing and leveraging customer information with every contact
- **Multimedia Customer Interaction:** Providing e-Business service to customers
- **Mobility:** Evolving from the traditional fixed to an increasingly mobile business environment
- **Convergence:** Retaining business applications as the enterprise infrastructure evolves

HiPath ProCenter Advanced Suite includes skills-based routing to take advantage of the each agent's unique skill set in order to put customers in touch with the most qualified representative immediately, regardless of media contact type.

HiPath ProCenter Suites eliminates unnecessary and time-consuming administration of groups by making all agents available without segmenting contact centers into fixed groups. This provides specialization without sacrificing efficiency. In addition, HiPath ProCenter increases flexibility by adjusting to current conditions and ensures the highest degree of caller satisfaction and overall best use of agent resources.

HiPath ProCenter Suites gets the call to the absolutely best qualified agent, while balancing customer needs with available resources on a dynamic basis. Contact center managers can set priorities and thresholds for skills requirements. The system lets contact center managers know when skills requirements are relaxed, when to broaden the pool of representatives and the order in which calls need to be answered.

A key advantage with HiPath ProCenter Suites is that it overcomes issues associated with the routing overflow by agent ID or group. Not only can the system review individual agent or agents availability for a specific call, it also can queue calls on the same basis. And overflow routing improves over time, as additional routing choices are added by agents' skill and or preferences.

Siemens Contact Center offerings include a broad range of products and services that address both general business and unique contact center environment requirements. This combination of call handling, reporting and administration tools help organizations:

- Optimize every call by leveraging knowledge management systems
- Balance the use of all resources — both people and technology
- Create and maintain a high-performance team
- Achieve excellence in management
- Maintain a competitive edge through flexible technology that can change as the business changes

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.

RESPONSE:

When using HiPath ProCenter Suites call data can be collected from network information digit collection via the internal Call Director application or from IVR prompts. After collecting call data, HiPath ProCenter can analyze the contact using Business Rules Routing (standard feature) and then optimize routing using two advanced call routing methods _ Skills-Based Routing and Performance Routing.

At the core of the HiPath ProCenter Suites is a patented component featuring virtual group routing, which intelligently determines the best possible match between a caller and an agent on a call-by-call basis. It enhances the routing intelligence in the switch by identifying caller requirements, then searching for available agents who best meet these requirements by virtue of their personal skill and preference résumé.

HiPath ProCenter Advanced Suites includes two significant routing features:

- **Performance Routing** serves as "cruise control" for the contact center, adjusting routing decisions dynamically on calls in progress to maintain preset targets based on Service Level, Average Wait Time, Estimated Wait Time, or Transactions In Queue, which allows for more dynamic or conditional feedback to be used in the routing decisions.
- **Business Rules Routing** creates conditional routing based on any of the following criteria:
  - Call Information (ANI, DNIS, RésuméRouting Queue). ANI and DNIS information may be used for lookup against the customer's database using ODBC.
  - Performance Data (Abandon Rate, Average Wait Time, Calls in Queue, Estimated Service Level, Estimated Wait Time, Oldest Call in Queue, Service Level)
  - Schedule (Day and Time or Specific Date)
  - Data collected by Call Director or an IVR used for lookup against the customer's database using ODBC

  Business Rules Routing provides the option of appending call data from the ODBC data source, Call Director or an IVR to the call, while the call is being processed through the flow diagram.

The call type determines the selection of agents that can handle the contact, or route the call to another site (for Networked Call Centers). The application determines call types using one of several methods:

- Basic routing through Routing Tables as follows:
  - A combination of ANI and DNIS for telephone calls
  - Email messages, based on address, or results of search of subject and message body on pre-defined criteria
  - URL for chat sessions, if a call type is not specified in the Web page
- Telephony calls:
  - Based on DNIS for PhoneMail or non-integrated IVR calls
  - Based on customer choices, for interactive applications such as HiPath ProCenter Call Director or integrated IVRs (bypasses Routing tables and enqueues telephony calls directly)
  - Based on call information, performance statistics, database queries and schedule information using Business Rules Routing
- A custom routing function, based on customer profile, history or preference (requires HiPath Professional Services or utilization of the optional software developers kit).

See Part E, Item 7 for additional multimedia routing information.

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.

RESPONSE:

HiPath ProCenter Advanced Suite was designed for a contact center requiring a single routing engine for inbound and outbound voice, email and web chat.

Customers can use custom routing for selected media types. All other media types will then use the default routing method. For example, a customer might wish to use custom routing for telephony, but use the sophisticated categorization engine (standard) to route emails. This can be done by entering the appropriate values in the Default Routing Media Types registry key. Using this configuration choice will save implementation costs and speed deployment of the total solution.

The call type determines the selection of agents that can handle the contact, or route the call to another site for Networked Call Centers. The call type also defines the requirements of the call as it waits in queue, enabling the Routing Server to find the best available agent licensed to handle the contact. The contact media itself is irrelevant. Email can be prioritized against inbound calls, outbound calls and chat sessions. Internet web contacts can be prioritized against inbound calls, outbound calls and email contacts.

If the application has not assigned the contact to an agent, the contact times out. When the contact times out, one of the following occurs:

- Voice calls are transferred to an extension or destination designated for timed out calls.
- Email messages are requeued to a particular time-out call type. Email messages sent for external consultation to an external Subject Matter Expert (SME) that are not responded to within the maximum consult time are requeued for the original handling agent.

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

RESPONSE: Yes.

For the distributed call center model offered in the Siemens solution proposed seasonal or at home workers are supported and multi-site networking is not required, a significant competitive advantage. Utilizing Siemens' Corporate Connect (teleworking solution), IP devices and the network infrastructure the agents distributed throughout the enterprise with this configuration option are considered *local* to the primary site where the HiPath 4000 and HiPath ProCenter server are located, providing full routing and reporting capabilities to all managers and supervisors.

When required, Siemens also offers a multi-site Networking feature option with the HiPath ProCenter Advanced Suite. HiPath ProCenter Networking provides call-by-call, skills-based load balancing capabilities between sites. When sites are participating in networked contact center routing the virtual multi-site feature considers all incoming calls for networked routing, regardless of the number of eligible and available agents at the local site.

The Networked Call Center feature enables each site to do the following:

- Manually control participation in a networked call center. A site can accept voice calls from, or distribute voice calls to, other sites only when the site is participating.
- Manually control which call types participate in the acceptance and distribution of calls, using the site's Administration Database
- Define the criteria for distributing a call to another site (best performing or preferred site)
- Define the criteria for accepting a call from another site

Routing decisions are based on site level or call type level statistics only. The networking application does not have access to the individual agent states at each site and therefore does not queue for specific agents across sites. The networking feature does not queue calls at multiple sites simultaneously.

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

RESPONSE:

With HiPath ProCenter Suites, Managers and Supervisors use the Administration desktop to enable routing modifications and moves and changes with no difficulty. In fact, it is a key competitive distinction for Siemens along with being able to make required changes during full production. Users can also utilize the HiPath ProCenter Supervisor desktop client application (optional license) for dynamic or on-demand changes to routing on a call-by-call basis.

HiPath ProCenter Administrator includes a graphical user interface that allows configuration of the skills, agents and contact information used for routing. Managers can dynamically update or modify routing rules and agent profiles. Siemens includes unlimited license rights with this tool. User access is controlled by detailed permissions and restrictions defined in the user profile.

The Administrator is used to configure the following:

- System settings, which are settings that control system communications, call matching, statistics gathering, and call routing
- Agent and department information, which includes agent résumés, permissions, and the ability to assign Agent or Supervisor user types.
- Call routing information, which includes information used to identify calls, and the definitions of call types, skills, and call requirements
- Features of the Agent application such as wrap reasons, unavailable reasons and messages

When designing the routing parameters for a call, managers have the ability to reserve designated calls for a specific agent. This allows a specific customer account to be handled by a specific agent whenever possible.

HiPath ProCenter Supervisor desktop allows users to manage routing interactively by reserving a specific call to a "best fit" agent while the call is waiting in the virtual queue. Supervisors can add or remove agents from the call requirement's virtual group and an Agent list (i.e., list of skills). Agents who have this desktop license and Edit permissions can make the same changes.

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.

RESPONSE: No.

Carrier-based, pre-call routing is not necessary to implement the recommended solution.

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.

RESPONSE:

Siemens recommends the integrated HiPath ProCenter Suites Call Director option for this requirement based on the limited traffic information provided in the RFI. Call Director provides front-end menus, announcements such as position in queue or estimated wait time, and collects digits that have been input by callers for identification purposes.

When combined with Call Director, HiPath ProCenter Suite can use caller voice responses to help determine a caller profile and build an appropriate virtual group. The goal of Call Director is to provide integrated call processing functionality at a lower price and reduced implementation time than a traditional IVR.

Using Call Director information the HiPath ProCenter server determines the estimated wait time for a specified call type. The estimated wait time is based on the number of contacts in the routing queues (skill specific) and the number of agents eligible for the respective call type.

For Web contacts, parameters are also provided by HiPath ProCenter Suite, allowing the Web server to inform internet contacts (via real-time screen display) of their estimated wait time to be routed to an available skilled agent.

In addition, Siemens also offers highly integrated, complete Interactive Voice Response (IVR) solutions that provide estimated wait time, position in queue and other extensive capabilities such as speech recognition.

C. Queuing (prioritization of routed contacts)

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

RESPONSE: Yes.

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

RESPONSE: Yes.

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

RESPONSE: No.

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

RESPONSE: Yes.

D. Enterprise Integration

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

RESPONSE:

HiPath ProCenter Suites are supported on the Siemens HiPath 4000, HiPath 3000 and legacy Hicom 300 TDM platforms.

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

RESPONSE:

HiPath ProCenter Suite is supported on the Siemens HiPath 4000, HiPath 5000 and HiPath 3000 Real-Time IP systems as well as the Realitis DX. The solution is also available for deployment in a non-Siemens PBX environment using **HiPath Applications IPortal**. This innovative offering has been quite successful and enables Siemens customers to take full advantage of the industry-leading HiPath ProCenter portfolio of customer interaction applications and services without having to replace their entire enterprise PBX.

HiPath IPortal seamlessly connects a customer's existing Siemens or non-Siemens PBX to HiPath ProCenter applications at significantly reduced cost and complexity. It facilitates an organization's opportunity to realize the benefits of unparalleled multi-media routing and reporting, CRM application integration, simulation, and desktop productivity tools for every user in the contact center. It also ensures that when they are ready, they

can migrate their enterprise communication end-users to HiPath IPortal - in segments or all at once. This strategy provides both implementation and financial convenience.

Siemens HiPath Applications IPortal for HiPath ProCenter Suites offers a broad range of products and services that address both general business and unique contact center environment requirements. This combination of call handling, reporting and administration tools help contact centers:

- Optimize every call by leveraging what is known about customers
- Balance the use of all resources — both people and technology
- Create and maintain a high-performance team
- Achieve excellence in management
- Keep a competitive edge through flexible technology that can change as a business changes.

A HiPath IPortal proposal specifically addresses the need for customers to transform their customer contact center so that they are able to tighten, improve and capitalize on relationships with their customers. At the same time, it allows clients to continue to leverage the investment their IT organization has made in systems currently serving their entire enterprise's telecommunications needs.

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

RESPONSE:

Siemens offers a variety of contact solutions as part of our HiPath ProCenter portfolio designed to run on both our Hicom series of traditional PBX systems and our HiPath Enterprise IP Convergence platform. The HiPath ProCenter portfolio consist of five customer interaction applications, each tailored for contact center requirements ranging in agent size and functional sophistication, from simple to highly advanced.

To meet the wide range of customer requirements for call routing efficiency, productivity tools and integration, the HiPath ProCenter portfolio includes:

- HiPath ProCenter Compact (supported by the HiPath 3000 platform): small to mid-sized call centers solution for basic real-time and historical reporting capabilities
- HiPath ProCenter Agile: group-based routing of voice only contacts (with new options for Email and Callbacks available in June 2005)
- HiPath ProCenter Entry Suite: basic call center functionality with no agent desktop applications requirements
- HiPath ProCenter Standard Suite: award winning skills-based routing engine, for both voice and email with blended queues and reporting
- HiPath ProCenter Advanced Suite: outbound and multimedia customer relationship management

Siemens also supports integration of Hicom and HiPath platforms with non-Siemens ACD systems such as Genesis, a key Siemens contact center solutions business partner or by using HiPath Applications IPortal (described in Item 2 above).

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

RESPONSE:

The recommended solution to provide IVR self-service functionality is HiPath ProCenter Prompt Response. Crealog and Intervoice IVRs have also been tested with the HiPath platforms.

HiPath ProCenter Suites also interface with non-Siemens provided IVRs using the Software Developers Kit and/or our standard API capabilities.

Additional information about HiPath ProCenter Prompt Response can be found in Section E, Item 3.

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).

RESPONSE:

On the HiPath 4000, three integrated HiPath IP gateways provide IP connectivity:

- The IP subscriber gateway supports IP subscribers, providing signaling for all HiPath 4000 features to the IP phone and gateway functionality (i.e., IP to TDM conversion and vice versa). The integrated Gateway supports G.711, G.723 and G.729A and operates Gatekeeper-less.
- The IP Access Point (IP AP) gateway interface converts the speech data of the PCM highways into IP data for the 10/100 Base-T LAN interface. This board integrates the following central and peripheral functions:
  - 10/100 Base-T Fast Ethernet network access
  - DSP based voice coder functions
  - V.24 interface for test access (service interface)

At each IP AP a counterpart to the host gateway is required to provide the same gateway functions as the host gateway, plus the functionality of the a line trunk unit controller as well as the telephony functions (tones, conference circuits, TDM switching and RAS).

- The IP trunking gateway supports private networking to other HiPath systems. HiPath Trunking Gatekeeper functionality is provided by the common control when locations need to be networked.

HiPath 3000 systems support the HiPath HG 1500 IP gateways. In addition, the HiPath 3000 itself acts as a Survivable Media Gateway.

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.

RESPONSE:

The subscriber line gateway (HG 3530) provides IP workpoints and analog devices access to the full range of HiPath 4000 features via CorNet IP. The gateway takes advantage of the existing IP infrastructure and supports up to 12,000 IP subscribers off a single HiPath 4000 communication server. Deployment of IP workpoints enhances user mobility, including E911 support.

Features and benefits provided by this integrated gateway include:

- Access to the full HiPath 4000 feature set to the optiPoint 410 IP phones and optiClient 130 softclient.
- Support for direct media connections between IP endpoints, resulting in highest quality voice and minimal delays
- A 10BT/100BT IP network interface and support for up to 240 IP workpoints off a single gateway. The subscriber line gateway can convert 60/120 connections into Fast Ethernet packets and provide TDM to IP conversion for 60/120 concurrent calls.
- Redundancy through standby and secondary gateways
- Support for G.711, G.723, G.729A/B codecs and gatekeeper-less operation. Wideband codecs according to G.722 are supported between optiPoint 410 IP phones.
- Support for all workpoint adapters that do not require their own B-channel. The phone adapter, a/b Adapter, S0 adapter and V.24 adapters are not supported.

Using CorNet IP interworking, an integrated IP trunking gateway supports interoperability with other HiPath 4000 systems. Two or more HiPath 4000 systems can be connected via an IP-based network using integrated IP trunking gateways. The HiPath 4000 Large Enterprise Gatekeeper (LEGK) is used to support registration, address resolution, output of IP address and number assignment, closed numbering plan and access to LCR of HiPath 4000 for up to 30 registered gateways (15 internal and 15 external) and 500 destination gateways. The LEGK Resource Manager also provides monitoring of network component utilization and control of direct media connections and IPDA traffic.

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
_√__MS-Exchange/Outlook

_√__Novell Groupwise
_√___Other (Please specify)

RESPONSE:

HiPath Xpressions can support Exchange, Lotus Domino and GroupWise or other IMAP4-compliant email users in one HiPath Xpressions system.

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.**

RESPONSE: Not applicable.

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
_√_ Other (Please specify)

RESPONSE:

HiPath Xpressions supports fax messages in a unified messaging implementation via an in-the-skins fax card or an external, third-party fax server.

OmTool Fax Sr., OmTool Genifax and Interstar LightningFAX are certified for integration with HiPath Xpressions. Other fax vendors certified on HiPath Xpressions Version 2.5 (such as RightFax) may use the Siemens HiPath Ready lab for re-certification with Version 3.0.

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.**

RESPONSE: Not applicable.

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

___ No
_√_ Yes. The following servers are supported:
_√_ Apache
_√_ MS-Internet Information Services

_√_ Sun Java Enterprise System
___ Zeus
_√_ Other (Please specify)

RESPONSE:

Supported Web Server Environments:

- Windows NT Server 4.0, Service Pack 5 running Microsoft Internet Information Server (IIS) 4.0
- Windows 2000 Server, running Microsoft Internet Information Server (IIS) 5.0
- Sun Solaris 8 running Apache 1.3 and Tomcat 3.2.3 or higher
- Sun Solaris 8 running iPlanet 4.1 SP7
- Sun Solaris 8 running iPlanet 6.0 SP1

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.**

RESPONSE: Not applicable.

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?

RESPONSE:

HiPath ProCenter Advanced Suite has a very rich Outbound option, including the ability to do proactive callback , that is cost effective for customers, doesn't require additional hardware and is fully integrated with the HiPath ProCenter Agent Desktop application. This solution offers preview-dialing capabilities and delivers higher levels of agent utilization while providing an accelerated ROI in contact centers that are primarily inbound centers but require the benefits of true call blending. Customers can also import calling lists generated externally or from other third-party applications. With this fully integrated solution there is no separate code base or multiple points of administration.

Callbacks are handled similar to preview dialing, where the agent sees the information about the caller first, and presses a button to call that customer. Once a callback is enqueued, it is handled very much in the same manner as an inbound telephony call. It is placed in the *same* queue as inbound calls. It is routed by the same sophisticated intelligent routing engine based on callback requirements and agents' skills.

For customers that wish to deploy third-party outbound dialing solutions that support predictive dialing, Siemens offers open functionality provided with our Software Developers Kit (SDK).

Software Development Kit

When additional customization of CTI integration is required, Siemens provides a Software Development Kit (SDK) to reduce the cost and timeframe required to implement a fully integrated CRM solution. The SDK is a toolkit that enables systems integrators, software vendors and resellers to integrate with the core components of the HiPath ProCenter Suites. This includes integration to callback/outbound server components of the architecture.

To address specific customer business needs, the Software Development Kit is available as an optional module to the HiPath ProCenter Suites. This approach provides the following benefits:

- Reduced development costs _ An open-standards based architecture using non-proprietary development languages enables organizations to leverage existing development resources.
- Reduced implementation timelines _ An SDK that bundles like functionality reduces implementation timelines through rapid integration and minimal training costs since it leverages existing desktop applications.
- Defined and proven technical support _ SDKs are supported by the HiPath ProCenter Partner Program, a comprehensive partner program which provides the tools, training and business and technical knowledge necessary to deliver integration that fulfill customer business requirements.

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

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

RESPONSE:

The HiPath 4000 uses a UNIX operating system. The servers for HiPath ProCenter Suites v5.1 utilize Windows 2000 server operating system.

HiPath ProCenter server software specifications:

- Windows 2000 Server SP4
- Windows 2003
- Internet Information Services 5.0 if IIS is required.

Supported External (Customer) Client Operating Systems:

- Windows 2000
- Windows XP
- Windows 98SE
- Windows 98
- Windows 95
- Windows NT 4.0

16. What relational (or other) database is supported? Check all that apply.

___ IBM DB2
___ MS-Access
___ MS-SQL
___ MySQL
___ Oracle
___ Postgres
_√_ Other (Please specify)

RESPONSE:

HiPath ProCenter Suites can access any ODBC compliant database. Dynamic Data Exchange (DDE) information is provided by the HiPath ProCenter application to gather data about a call that has been assigned to an agent's workstation.

Siemens also offers pre-packaged integration between HiPath ProCenter Advanced Suite applications and industry-leading CRM applications from Remedy, Front Range, SAP and Siebel. HiPath ProCenter Services can also provide integration to other databases (including SQL).

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

_√_ Included in the call center application
_√_ Supplied by the customer

RESPONSE:

For the call center application design database, depending on customer requests, either the customer can build and supply the database or Siemens resources will define it. For integration with customer account records, Siemens can offer pre-packaged integration with a CRM application from Remedy, Front Range, SAP, Siebel or accomplish integration with other databases through HiPath ProCenter Services.

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

_√_ E.piphany
_√_ Oracle and Peoplesoft
_√_ SAP
_√_ Other (Please specify)

RESPONSE:

Siemens offers pre-packaged integration between HiPath ProCenter Advanced Suite and industry-leading CRM applications from Remedy, Front Range, SAP and Siebel. HiPath ProCenter Services can also provide integration to *other* databases:

- With standard integration capabilities via published APIs included in the solution for no additional feature cost
- By purchasing the optional Software Development Kit and accomplishing implementation using their own IT staff
- Using custom routing integration accomplished with professional services resources (such as with E.piphany, Oracle or Peoplesoft).

This flexibility delivers the highest business value for our prospective customers and sets us apart from other vendors offering similar solutions.

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

___ CLI (Command Line Interface)
___ GUI (Graphical User Interface) 32-bit binary application

___ GUI 64-bit binary application
___ Web-based administration
_√__ Other. (Please specify)

RESPONSE:

The HiPath ProCenter Administrator tool (always included) uses a graphical user interface (GUI) that allows administration and configuration of the skills, agents and contact information used for routing. Managers and supervisors can dynamically update or modify routing rules and agent profiles, even during full production routing. A capability highly regarded by our customers. Siemens includes unlimited license rights with the purchase of the solution. User access and security is controlled by detailed permissions and restrictions defined in the user profile.

20. Do you supply a developer's tool kit with the call center?
___ No
___ Yes, gratis
_√_ Yes, at cost of: *Pricing varies based on required SDK components*

RESPONSE:

HiPath ProCenter Software Development Toolkit (SDK) has been designed to help enable systems integrators and developers to interact with the core components of the HiPath ProCenter Suites. This enables developers to integrate custom solutions with HiPath ProCenter applications for extended contact center functionality, such as creating a custom desktop, custom Softphone integration, special multimedia interaction handling, agent screen pops, custom routing and statistical reporting. The SDK requires membership in the HiPath ProCenter Partner Program.

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.**

RESPONSE:

First, data can be attached to call events for business rules routing or screen delivery purposes using standard API capabilities provided with the HiPath ProCenter Suite.

Second, Siemens has created a series of applications called CRM Ready kits that leverage the benefits of open standards and standard Application Programming Interfaces (APIs) to simplify connection of devices and applications. With Siemens' CRM Ready kits, customers reduce or eliminate the time and expense required to integrate CRM applications with Siemens solutions. CRM Ready kits act as the "glue", making HiPath ProCenter Suites and a CRM applications work together for enhanced capabilities and faster deployment. Each kit has a pre-defined set of features; customers who require additional features would need a custom integration.

For each CRM Ready kit the integration capabilities and out of the box functionality vary. For example, the SAP Business Routing System integration offers the following functionality and benefits.

- Allows business data to be directly downloaded from the SAP CRM system for intelligent routing

- Improves routing efficiency and effectiveness of multimedia contacts
- Provides a single point of configuration
- Enables coordinated screen-pops and consolidation of desktop functions

The integration of the Siebel solutions allows users to:

- Access their contact centers through all media
- Have immediate access to customer information through automated screen delivery
- Utilize their CTI Toolbar to control and monitor specific functions
- Monitor Call Center statistics through the message bar

Finally, the published APIs and the SDK allow HiPath ProCenter Suites to be integrated with virtually ***any*** third party, back-office or front-office application with integration services, including attachment of key data to call events.

In fact, with Siemens, the customer has many choices and doesn't pay for additional call center software components for basic CTI integration capabilities, a key competitive distinction.

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.**

RESPONSE:

HiPath ProCenter Suite agents use the Desktop application to view and handle customer contacts from all media — telephony, callbacks, email and chat sessions.

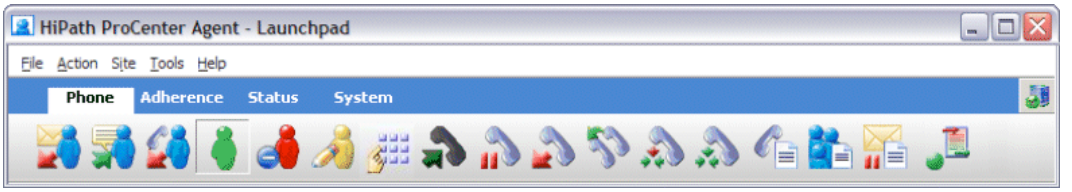
The HiPath ProCenter Desktop resides on customer-provided PCs and provides access to agent adherence and personal performance statistics, as well as online telephone features and a simple CTI screen-pop. The application is highly customizable. With host integration, components of the HiPath ProCenter Desktop application blend with a CRM application, eliminating the need to have multiple applications running on the agent desktop.

Features common to all user types are:

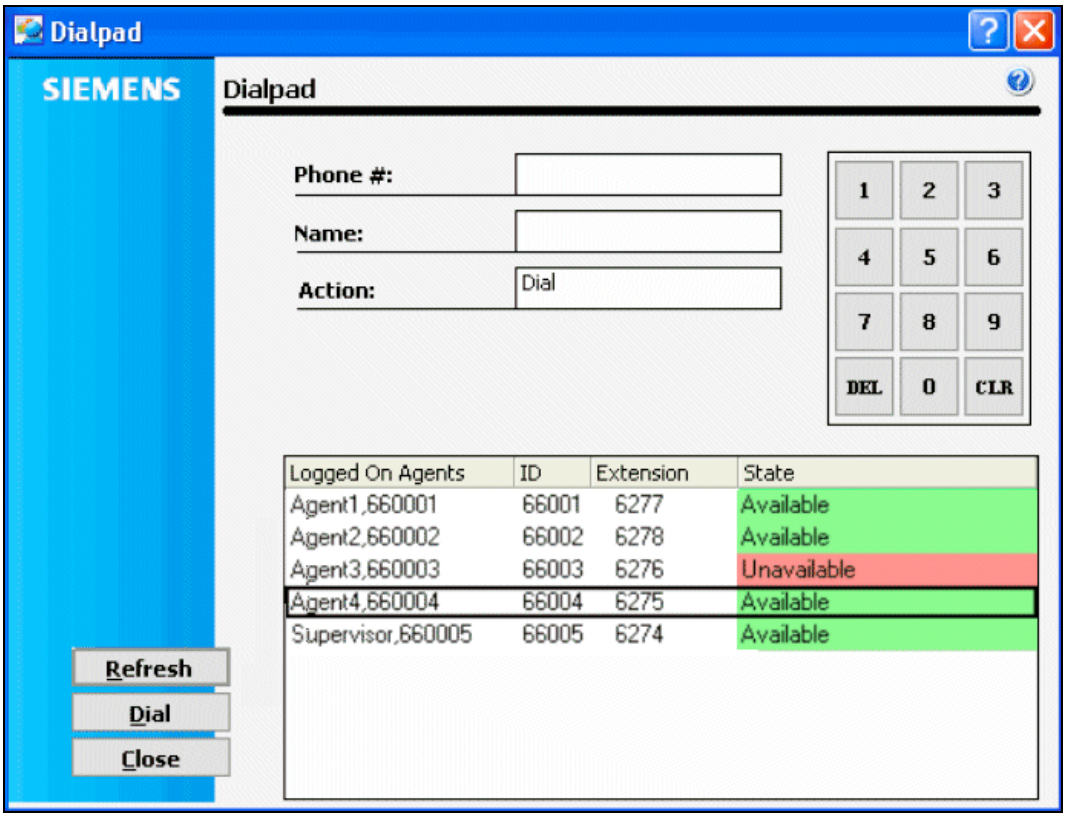
- The Launchpad
- The Softphone and Dialpad
- Virtual Queue View
- Normal, urgent and emergency messages
- Automatic log on to the application

Several samples of the desktop screenshots appear below:

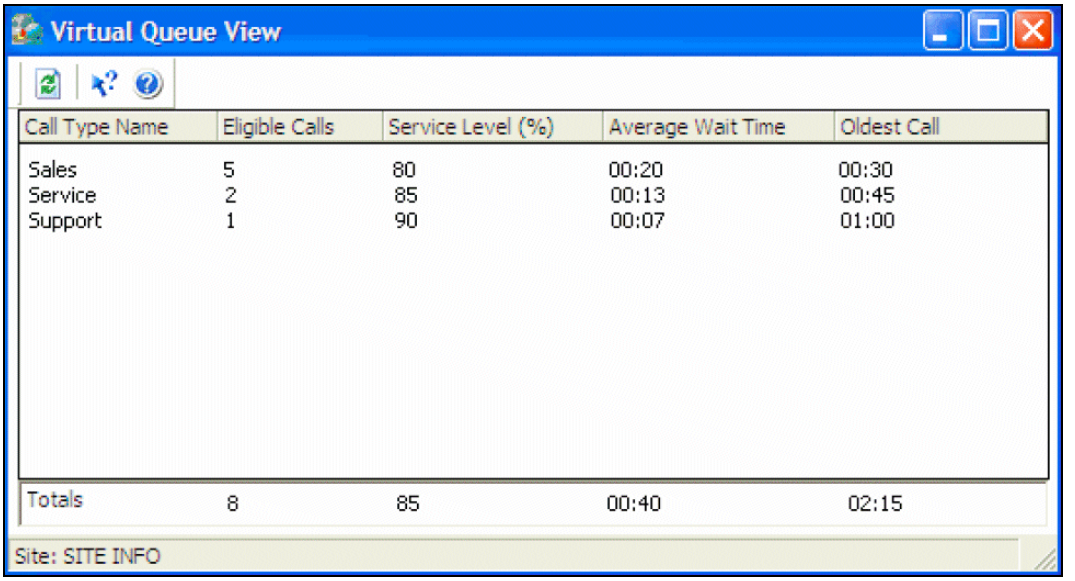
The **Launchpad** is the main window of the Desktop application. Launchpad components include function keys that agents use to activate a feature; display boxes that show statistics such as performance or calls reserved for an agent; tabs (grouping of related buttons) and in the far right corner a status indicator.



The **dialpad** allows an agent to identify the status of logged on agents, while an agent is not connected to a call.



A **Virtual Queue View** displays summary information for all customer contacts in the queue that an agent is eligible to handle.



Custom integration is only required if the client wishes to utilize key components of the desktop within the schema of their CRM application. Desktop functions are exposed for use with the standard APIs and with the SDK.

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

RESPONSE:

A few of the business applications that integrate with HiPath ProCenter Suites include solutions that provide IVR functionality, workforce management (Blue Pumpkin) and quality monitoring (Verint), among others.

HiPath Prompt Response

For the past thirteen years, Siemens has partnered with Intervoice, the market dominator in Interactive Voice Response systems and Siemens is their largest distribution channel worldwide. With an OEM VAR agreement between the two companies, the Siemens logo is placed on the products manufactured *by* Intervoice *for* Siemens customers.

HiPath Prompt Response is the Siemens recommended solution for high-end call automation and speech recognition requirements. The key functions of the Prompt Response IVR system are:

- Answers and routes call.
- Provides authorized caller access to database information.
- Allows information retrieval via telephone or Internet.
- Enables callers to input data via touchtone or spoken word.
- Offers text-to-speech (TTS) for communication of rapidly changing data.
- Delivers fax-back confirmation and information fulfillment.
- Employs voice forms that enable callers to leave short messages.

Blue Pumpkin Workforce Management

Siemens and Blue Pumpkin Software have developed special integration plug-ins for Blue Pumpkin Director Enterprise, Blue Pumpkin Director Essentials and HiPath ProCenter Suites. Plug-ins provide out-of-the-box integration between Blue Pumpkin's Workforce Management offerings and HiPath ProCenter Suites and retrieve the historical call/contact data necessary for building a forecast via a direct database connection between the two systems. Because our plug-ins have been co-developed, you are assured that it is Siemens Ready lab-tested and certified, and you can rely on Siemens as a sole source for service and maintenance. Customers are now able to take advantage of HiPath ProCenter features and functionality to realize the full potential of their technology investments.

Verint Quality Monitoring

ULTRA or ULTRA Express Quality Management from Verint provides monitoring and evaluation tools for enhancing the quality of your customer interactions. ULTRA Express Quality Management measures more than just agent performance. It measures how well your people, processes, and products meet customer needs. And it helps you pinpoint cost and process inefficiencies for a more profitable operation.

ULTRA Express Transaction Management helps you ensure regulatory compliance, manage disputes, and minimize loss. ULTRA Express Transaction Management captures every transaction in its entirety, through transfers and holds, and enables your staff to find and review recordings in just seconds.

ULTRA provides a single platform for running multiple recording applications. These applications); all on a single, client-server platform, can include:

- Full-time recording of all calls to monitor the "customer experience"
- Quality monitoring for agent evaluation and training
- On-demand and event-driven recording for transaction verification (such as sales centers

A true multimedia platform, ULTRA can simultaneously record voice, data and video (screen capture), as well as fax. Verint's Virtual Playback™ feature (using LAN, LAN/WAN or Internet) allows access to multiple supervisors from any desktop or telephone, anywhere in the enterprise.

Other Applications

In addition, the Software Development Toolkit (SDK) enables systems integrators, software vendors and resellers to integrate with the core components of the HiPath ProCenter Suites. Only certified partners have access to the SDK to ensure they understand integration capabilities and have undergone training and certification.

The types of applications you would integrate with include external customer service applications (you could initiate CTI type functionality from HiPath ProCenter while using an external desktop application), outbound marketing, workforce management or other custom applications. Some of these applications include SAP, CRM Solutions from Siebel, Peregrine Systems (Remedy), NICE Systems and Microsoft CRM.

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

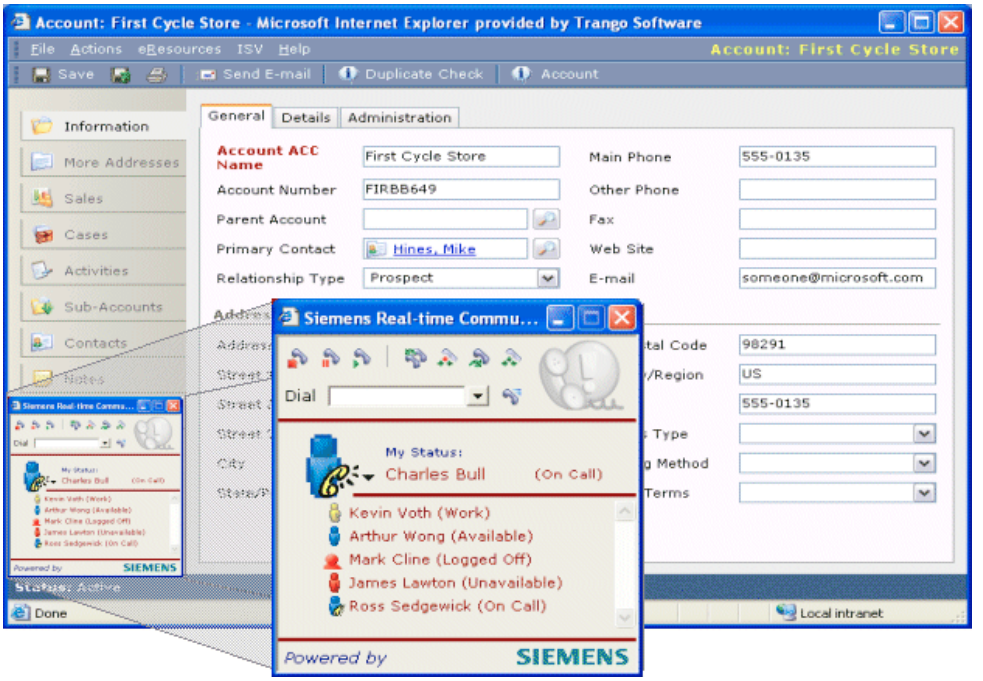
RESPONSE:

A typical example of the SDK integration capabilities is the integration of HiPath ProCenter Suites with Microsoft Business Solutions CRM, a comprehensive software package for managing customer relationships.

Microsoft CRM, together with the HiPath ProCenter Suite, helps give contact center agents the information they need when customers call so they can provide faster, higher quality responses. This can lead to greater customer satisfaction in times when service problems require a quick resolution. And in selling situations, it can lead to new revenue opportunities when agents can up-sell and cross-sell more, given better information about both the customer and products. In addition, because new agents need only to learn a single integrated application, training time and costs may be less than having to learn two separate applications.

Among the key features offered by combining the capabilities of the HiPath ProCenter Suites with Microsoft CRM are:

- A unified Microsoft CRM desktop that provides contact center agents telephony, productivity and communications tools in a single screen so they don't have to toggle between different applications (see figure below).
- Automated screen pops when incoming calls arrive that bring a customer's Microsoft CRM record to the agent's PC without the agent having to search for it.
- A "Business Rules Routing" feature that uses customer information to route the call and the caller's information to a particular agent or set of agents depending on the firm's CRM business strategy and rules _ even directing a call to an assigned agent or to the last agent who handled the call.
- An integrated skills-based routing engine that sends the call to the person with the know-how and skills to handle a particular issue or situation that might be defined by the phone number the customer called or by a firm's interactive voice response filtering mechanism.
- An automated callback feature that allows agents to schedule follow ups or return calls for service or contact follow-up through the Microsoft CRM desktop.

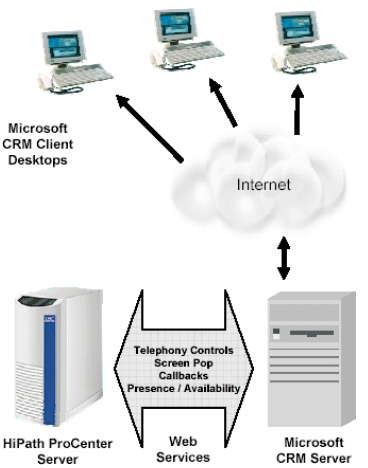


HiPath ProCenter and Microsoft CRM for Presence, Availability and Collaboration

The integrated solution leverages communication functions provided by the Siemens HiPath ProCenter Server, as Web Services.

Built within the Microsoft .NET Framework, this enhanced functionality is accessible to the Microsoft CRM client desktop in a standard web browser interface.

The figure opposite illustrates the components of this industry-leading solution.



The HiPath ProCenter Software Development Toolkit (SDK) has been designed to enable systems integrators, developers and customers to interact with the core components of the HiPath ProCenter Suites to provide custom applications. There are three elements to the SDK: the Siemens HiPath ProCenter Partner Program, the Siemens HiPath ProCenter Customer Program and the SDK Run Time Module licenses.

Partner Program

The Partner Program is a certification program directed at third-party vendors interested in developing custom applications with the HiPath ProCenter Suites. This fee-based program provides access to the SDK, training, documentation and support.

Customer Program

The Customer Program is a certification program directed at Siemens HiPath ProCenter customers interested in developing custom applications in house with the HiPath

ProCenter suites. This fee-based program provides access to the SDK, training, documentation and support.

Run Time Module Licenses

When a partner develops an application using the SDK, they must also purchase Run Time Module Licenses. Applications developed using the Run Time Modules (RTM) fall into two categories: Server-Based Applications and Client-Based Applications. At a minimum, a custom application will require the server-based RTM. In addition, the client-based application applies when customizing a feature that is licensed by agent, such as the HiPath ProCenter Agent Desktop.

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

RESPONSE:

The HiPath strategy is focused on realizing the value of next generation applications, including eCRM solutions from Siemens partners.

Siemens' unique focus on applications functionality and portability shows our strength, as customers begin looking at the total costs and benefits of convergence. Sustained growth will increasingly depend on the ability to deliver, deploy and support applications, including support for third-party applications integrated with the HiPath ProCenter Suites. Success in the long term will require not only applications technology, but also the sales, service and support competency to execute at the applications level.

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.**

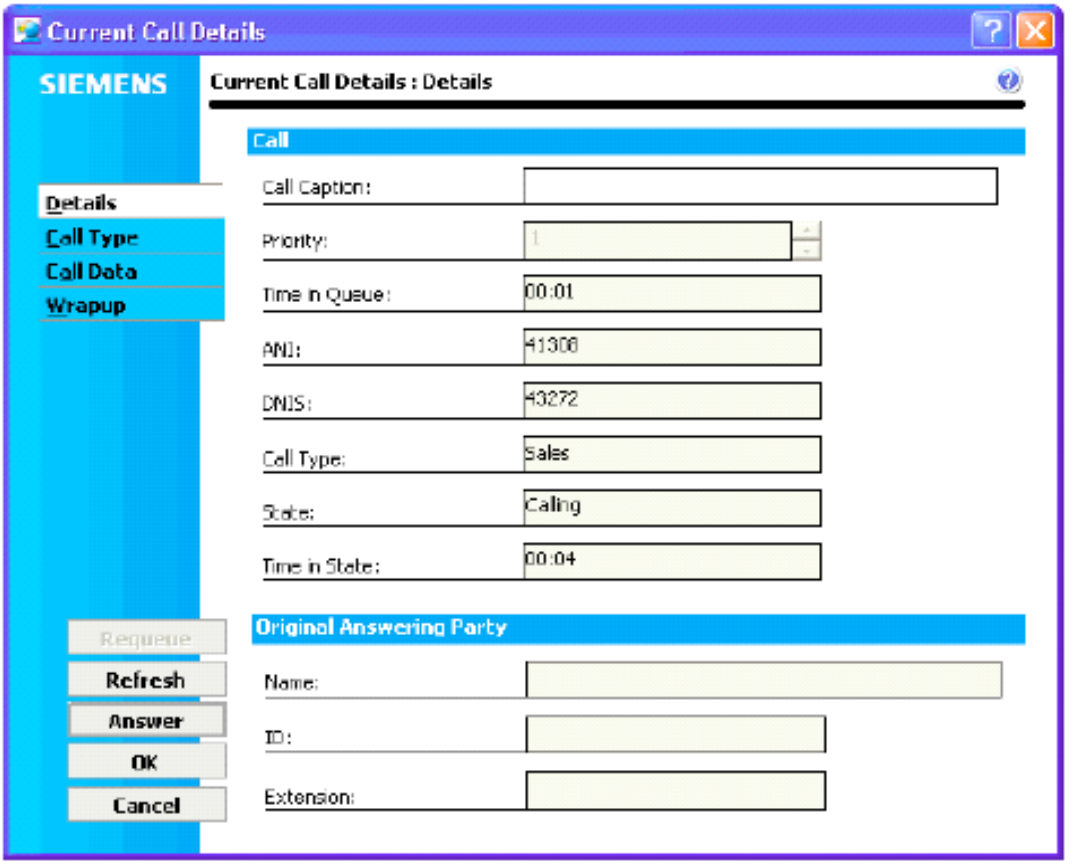
RESPONSE:

Agents and Supervisors can handle a number of types of media—telephony calls, callbacks, email messages, and WEB chat sessions—depending on licenses purchased.

HiPath ProCenter Suites assigns a customer contact to an initial agent based on predefined criteria and agent availability. The agent is notified about a contact by a Details dialog box (screen-pop) that opens up on their desktop.

Contact Details Screen Pop

Agents use the **Current Call Details** dialog box to see the details about a telephony call.



Call Details Dialog Box

If an agent has *Screen Pop permission*, the **Current Call Details** dialog box appears automatically when they answer a call. If they have URL Screen Pop permission and the call type has a URL associated with it, a URL associated with the call type of the telephony call pops up on the screen in their default Web browser. The URL could be a link to a Web page that contains product information or agent instructions.

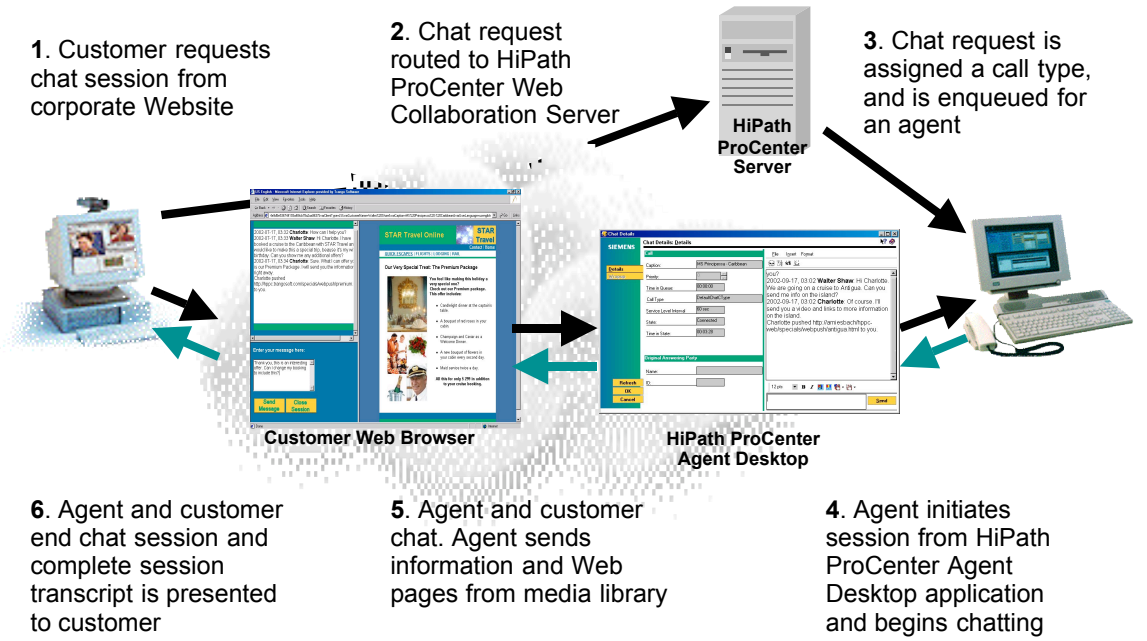
For queue observation and depending on the level of capabilities required the agent does have to utilize another application window, either a license of the Supervisor desktop, our MessageStream real-time reporting client or rely on their virtual queue window, which is a standard component in the Agent desktop client.

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?

RESPONSE:

HiPath ProCenter Advanced Suite includes optional features such as Outbound and internet-based collaboration (Web Chat). With these features, HiPath ProCenter Advanced Suite's skills-based routing lets customers define virtually every type of business transaction in a unique way—blending inbound calls with other transaction types such as callbacks, outbound, e-mails, and web chats.

The Chat feature is fully integrated with HiPath ProCenter Advanced Suite, which uses the same routing and reporting engine for calls, callbacks and emails in both single site and multi-site configurations. With the recommended configuration (single site with distributed agents using IP) remote agents are treated as local agents and have full routing, reporting and desktop feature functionality. The routing routine is applicable to all Kodiak sites.



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

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

RESPONSE:

The HiPath 4000 and/or HG 3550 integrated IP trunk gateway support the following standards:

- CTI support for CSTA and TAPI
- E.163 public network numbering plans
- E.164 international numbering plans
- G.165 echo cancellation
- QoS
  - IEEE 802.1d

- DiffServ (RCF 2474)
- IEEE 802.1 p/q in Layer 2 (VLAN-tagging)

- IP access via http, telnet and FTP
- LDAP
- T.38 real time facsimile transmission
- TCP/IP signaling

F. Telecommuting

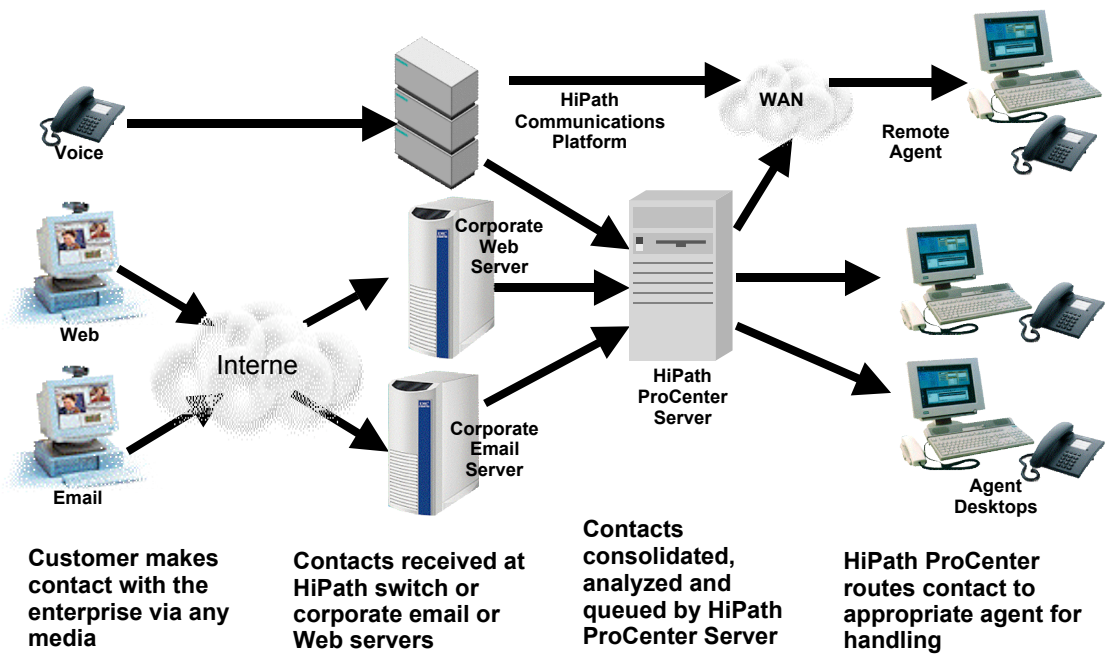
Kodiak would like to give call center employees who live in the Bay area and in Los Angeles basin the option to telecommute from home via their broadband connections. The company wants to provide the flexibility for those in the call center to be able to work from home in a seamless manner. There will 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: HiPath CorporateConnect

2. Provide per employee price for telecommuting product: **$ 719.00** estimated installed price based on typical customer discounts.

3. Provide a diagram of your proposed telecommuting solution.

RESPONSE:



Sample Teleworking Environment

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

RESPONSE:

HiPath CorporateConnect is a robust enterprise mobility solution designed for enterprises with mobile workforces—from highly mobile end users to employees who work permanently from home. CorporateConnect enables workers to have only one telephone, one telephone number, and one voicemail box for all their calls—regardless of location**.** Siemens helps global enterprises overcome the limitations of today's mobile environment by offering three options designed to meet the varying needs of the mobile employee.

CorporateConnect integrates cellular telephones into a company's communications processes and offers users "One Number Service" ensuring end users can be reached at a single telephone number, regardless of location or device. Mobile employees enjoy the familiar telephony features of their company's HiPath communication platform and are now able to make calls from their cellular telephone using the company's voice network.

It is the customer's responsibility to provide high-speed data access for use of Agent desktops.

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**.

RESPONSE:

System Capacities	
Configured Agent Phones	**2,000**
Active Agents	**750**
Agent IDs	**4,000**
Route Control Groups	**1,020**
Shift Sets	**1,020**
Queue Slots	**7,500**
Recorded Announcements	**206**
Calls Connected to Same Recording	**50**
Music Ports	**32**
Calls Connected to Same Music Source	**100**
Queue Priorities	**100**
Supervisor Messages Queued	**256**
Max Networked sites	**5**
Call Requirements	**1,000**
Call Types	**1,000**
Skills per Call requirement	**100**
Number of supervisor stations	**Can be all users**

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

RESPONSE:

750 active Agents/Supervisors.

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

RESPONSE:

The HiPath 4000 supports up to 512 trunk groups. However, defined by trunk group, the switch can limit the number of trunks within the specified trunk group that are allowed at any given time to receive ACD calls. This capability allows customers to ensure that non-dedicated trunking resources are not inundated with ACD calls, thereby prohibiting the use of other incoming or outgoing calls.

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

RESPONSE:

The maximum number of Busy Hour Inbound Calls is 12,000 per system.

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

RESPONSE:

The HiPath ProCenter Suites maximum number of Routing Entries is 15,000.

On the HiPath 4000, the maximum number of ACD Routing Tables is 4,000 with the number of Steps per Table being 64 maximum per Table and 64,000 per System.

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

RESPONSE:

The number of virtual agents is dictated by:

1. Software licensing
2. Switch resources
3. Network design and capacity

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

RESPONSE:

Statistical data storage periods are configurable per time increment. Data past the configured storage period is automatically deleted each day at the database maintenance hour. When installed, the Administration application is already configured with default

settings for the report storage periods. These default settings can be changed at any time.

The maximum configured values are:

15-minute data	42 days
Daily data	100 days
Weekly data	53 weeks
Monthly data	25 months
Agent Time in State data	6 weeks
Administration Audit data	60 days

Custom reporting configurations are also available to extend report storage beyond these limits.

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

RESPONSE:

The maximum Skills per individual agent resume is 100, with the maximum number of Skills per system being 1,000.

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

RESPONSE:

HiPath ProCenter Advanced Suite agents may have their skill level identified (1-9) as well as a preference level (1-9) for every skill in their resume.

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.**

RESPONSE:

Supervisors have the ability to monitor call center activity through real-time reporting from their desktop.

The desktop allows supervisors to:

- Monitor all media types in views - telephony, email, callbacks, and chat:
  - Real time performance statistics for call types, ACD groups or aggregates
  - Recent historical contact center performance statistics
- Create and customize views that are saved centrally by supervisor.
- Create Agent alarms and thresholds - A user can set high, medium and low alarms by agent or department statistics in the Agent Threshold Properties dialog box:

In addition, two levels of historical statistical reporting are provided for all media types: Standard and Call-by-Call.

Standard reporting is based on summary-level data tables that are cumulated every 15 minutes. Call-by-call reporting enables customers to keep detailed records about every call and wrap-up data completed by agents for each call. With call-by-call, customers can run additional report templates and they can create queries against the call-by-call data using the Life of Call Utility.

The Graphical Report Writer (optional but included in proposal) allows customers to run pre-defined graphical reports, modify existing graphs, or build their own custom graph. All graphical reports are based on 15-minute, daily, weekly, and monthly historical data.

Supervisors can monitor telephony, email and chat transactions from their desktop as well. Agent activity can be recorded for quality monitoring via a third-party application such as Verint or Nice.

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

RESPONSE: Yes.

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

RESPONSE: Yes.

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

RESPONSE: Yes.

5. What file formats can you export reports to?

RESPONSE:

With HiPath ProCenter Reporter (standard feature with unlimited licenses) users can:

- Display a report
- Send a report to the printer
- Export a report to a different file type
- Set a single time and location for generating a report
- Schedule a report to run on a recurring basis automatically
- Manage the pending print jobs they are sending to the printer

HiPath ProCenter Reporter enables users to generate reports from configuration information in the Administration Database and error and simulation reports. Other enhanced report features include the ability to select individual agents and call types; multiple report formats (HTML, Excel, .CSV, .TXT) and ability to schedule recurring reports.

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.**

RESPONSE:

HiPath ProCenter Suites provide real-time communications to optimize customer value and improve contact center productivity without added complexity. In addition, it provides the ability to seamlessly evolve to IP with investment protection. HiPath ProCenter Suites provide superior multimedia skills-based routing and robust reporting in a range of cost-effective packages or customized solutions, from small to large or simple to complex, all providing accelerated Return on Investment. HiPath ProCenter Suites operate in circuit or packet switched environments, allowing customers to invest with confidence in CRM solutions regardless of their infrastructure choice.

HiPath ProCenter Suites provide:

- Faster and lower risk implementation based on custom features at a packaged price
- Better agent utilization, shortened learning curves and increased first contact resolution with multimedia skills-based routing and virtual groups
- Increased management and administrative productivity with fully integrated multimedia, unified views, management reports and administration tools
- Works in TDM, IP and hybrid environments providing practical solutions with investment protection
- Hard-dollar savings, a quick payback period and an impressive ROI.

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.**

RESPONSE:

In North America, Siemens provides products and services through a dedicated direct sales force with experienced customer interaction consultants, as well as uses certified and trained channel partners. Only Siemens offers this level of wide-spread market coverage and extensive customer choices based on their convenience.

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

_√_ Direct sale
___ Certified Resellers
_√_ Channel Partners
___ Resellers
___ Other (Please explain)

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

RESPONSE:

$ 388,532 estimated installed price based on typical customer discounting

This price includes the following components:

- 300 Active Agents
- 300 Agent Desktops licenses

- 20 Supervisors Desktops licenses
- 1 Server (Rack Mount and including RAID)
- 1 Auxiliary Server (Rack Mount)
- 100 Email Agent licenses
- 100 Web Collaboration (Chat) licenses
- 100 Outbound Agent licenses
- Graphical Report Writer
- CTI Screen Pops via Agent Desktop

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

RESPONSE:

Siemens HiPath ProCenter Suites and all proposed solutions and components come with a standard one year warranty, including maintenance and support

Second year maintenance and support pricing **- $** $57,128

5. Do you provide on site training?

___No
_√_ Yes (answer question 6)

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

RESPONSE:

$9,995.

Includes On-Site Agent / Supervisor Training 200 Agents and a formal 1 Week ProCenter Administration Class for up to 20 supervisors.

VII. Vendor Information

1. How long have you been in business?

RESPONSE:

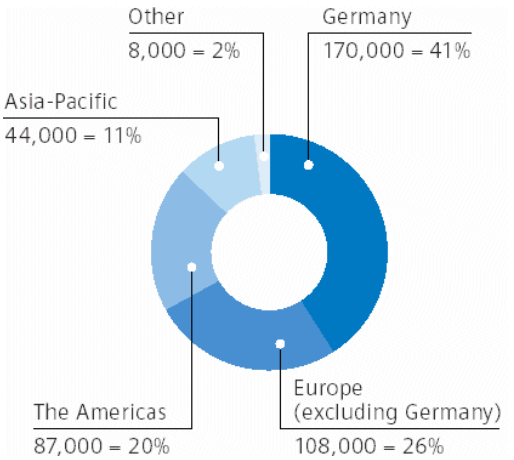
Siemens AG, established in 1847, combines technical innovation and experience with best-of-breed applications of its industry-leading partners. On that foundation, Siemens Communications, Inc. (Siemens) delivers and supports converged voice, video and data solutions that are reliable, easy-to-use and solve customer problems. Siemens is comprised of three divisions: mobile networks, enterprise systems and services and carrier networks and services.

Siemens Information and Communication Networks, Inc. was incorporated on September 25, 1998 under the laws of Delaware. Effective October 1, 2004 Siemens Information and Communications Networks, Inc. (Siemens ICN) was merged with Siemens Mobile Communications, Inc. (Siemens ICM) to form Siemens Communications, Inc.

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

RESPONSE:

The figure below summarizes the distribution Siemens AG's global human resources:



Siemens Communications, Inc. has 4,900 employees in the U.S. and 60,000 globally in 160 countries.

3. How long has the product been shipping?

RESPONSE:

Siemens first released its integrated ACD software in 1982 and introduced the award-winning RésuméRouting skills-based routing server-based application in 1995. The application's subsequent releases occurred as follows:

- RésuméRouting, Release 2 _ April 1998
- BusinessView Composer, Release 6.5 _ May 1998
- RésuméRouting, Release 3 _ April 1999
- HiPath ProCenter, Release 4 _ October 2000
- HiPath ProCenter, Release 5.01 _ April 2002
- HiPath ProCenter, Release 5.1 _ December 2002

Siemens is currently in field trials of the next release of HiPath ProCenter Suites V6.5, scheduled for general availability in June, 2005.

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

RESPONSE: Yes.

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

RESPONSE:

Siemens Communication, Inc. is headquartered at 900 Broken Sound Parkway, Boca Raton, FL 323487 (1-561-923-5000; http://communications.usa.siemens.com/). In addition to its Boca Raton, FL headquarters, Siemens has principal offices in Dallas, TX and Chelmsford, MA.

Siemens products are distributed in North America through more than 52 sales and service locations. These offices also provide an umbrella of support serving more than 30,000 customers spread across the U.S. and Canada.