Practical guide to creating a contact center RFP

Find the right partner so you can delight customers, engage employees and exceed business goals.

**BLACK BOX**

GENESYS

A request for proposal

Selecting a new contact center vendor is a big decision. It's also an exciting time for your organization. There is a lot of new technology available for your consideration, including cloud capabilities, omnichannel solutions, artificial intelligence (AI) and much more. So you need to know which questions to ask and how to get information that's most pertinent to your organization.

This guide simplifies the evaluation process, gives answers to your unique business needs and compares top vendors side-by-side — all so you know you're choosing the right partner for your organization.

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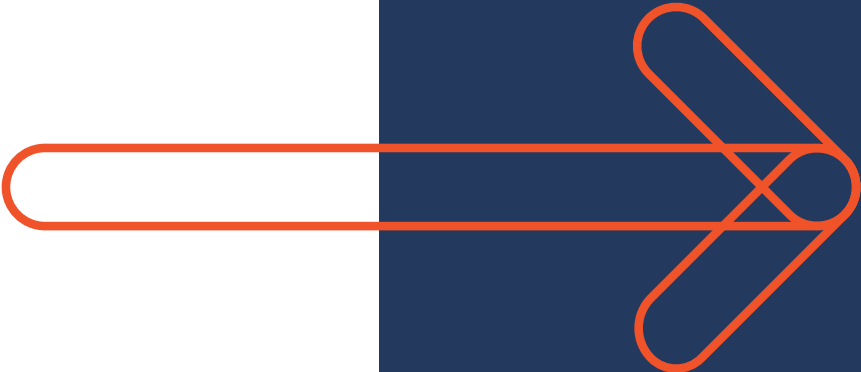
Getting started

Why RFPs are essential for your call center

Organizations use RFPs, or requests for proposal, as part of the process to identify and select the best product or service for their unique requirements.

Before RFPs, companies found vendors through recommendations or at in-person networking events. It was inefficient; and today those "handshake" deals aren't enough to pass muster. In the early 1960s, one airline used the RFP concept in the form of a questionnaire to pare down the number of vendors it wanted to evaluate for a service. Considered highly innovative at the time, it asked vendors to answer 18 questions. Today, most RFPs are much more comprehensive.

There are many types of process requests. Here are three of the most widely used.

- **RFI** – Request for information educates the requestor; best used for exploration as it seeks broad data and knowledge from a wide range of vendors.

- **RFQ** – Request for quotation quantifies offers by asking vendors to competitively price a specific chosen solution.

- **RFP** – Request for proposal compares vendors based on business needs and seeks specific solutions to meet requirements; could follow an RFI.
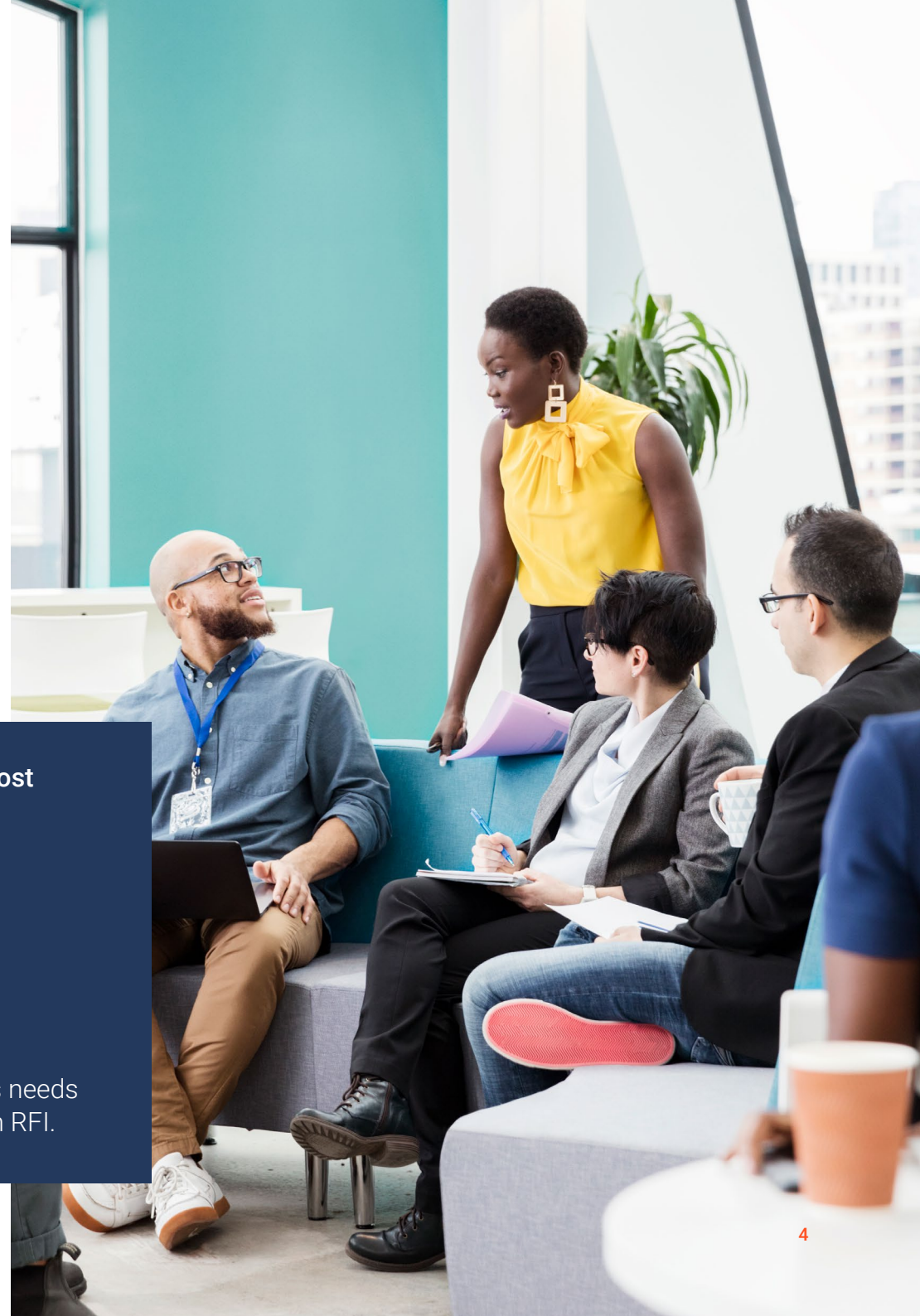
Why rely on RFPs

When considering a major purchase for your contact center, a formal RFP will specify what your requirements are from a business and technical perspective. The RFP process often is triggered when a contract with an existing supplier is up for renewal and you want to see your options, for example, in the case of moving to the cloud.

RFPs help businesses understand their needs to outline requirements up front for a specific initiative or project. Details in the questionnaire template outline those needs. Basically, the RFP is an invitation to vendors to compete for your business. And, because you determine the criteria, they must do so in a very specific and standardized way. Essentially, the RFP process attempts to level the playing field and minimize bias.

Some industries require that vendor selection goes through an RFP process, even when they know which solution they want. This is common in highly regulated industries like government agencies. Some companies or industries also have a procurement mandate that require competitive bidding for all contracts.

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How RFPs pay off

RFPs help you select products and negotiate with vendors. Not only do RFPs make it easier for vendors to respond in a structured, methodical way, they also allow you to accurately compare the most important vendor capabilities. For example, the structure of an RFP allows for weighted scoring – assigning point values – based on different business priorities. Integration with back-end systems or how innovations are delivered might be more important to you than a supervisor's ability to move people in queues.

Clearly establishing requirements and evaluation criteria up front in your RFP also gives you an objective and defensible outcome beyond cost. While relationships with vendors outside of the RFP process are very important, a data-driven approach lets you ask very specific questions about supplier capabilities, certifications, pricing plans and more. You also can encourage vendors to suggest solutions to a problem, including outlining new or better processes. In other words, you don't need to know the right answers up front, only what's most important to you.

"When RFP specifications are too broad, that lack of clarity makes it difficult for a vendor to determine your needs and submit a high-quality and relevant proposal."

Bonfire

When not to use RFPs

The RFP process is complex; don't use it too often or exclusively as a sales tool. An overly complicated RFP process isn't necessary for simple questions that can be answered in a sales meeting, for example. In these cases, using an RFP could put off prospective bidders who might not feel it's worth their time and resources to complete.

However, in some heavily regulated environments or the public sector, RFPs are mandated. If your request is simple but you must use an RFP, keep your questions as specific and focused as possible.

Digitizing the RFP process has shortened the time it takes to post, evaluate proposals and select the winning proposal. It also allows for data analysis that could improve your overall RFP process.

Why get RFP advice from Genesys

Each year, Genesys responds to thousands of RFPs. Most of those requests are good at capturing base functionality and information but miss many of the new features and capabilities available.

They also tend to overlook details about the cross-connected future as systems continue with higher integrations. Modern customer experience systems are increasingly powerful and have better connections, and this complexity can yield new competitive benefits when harnessed.

As you dig into this practical guide, keep your business needs in mind. Be sure to also consider the new ideas and technologies we are seeing in the market today as well as in the near future.

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Building blocks

RFP building blocks

RFPs are a great tool for gathering only pertinent details so you can easily identify a winning proposal. You'll gain a more precise picture of what companies offer. And that additional information will enable you to make clear, fact-based comparisons of vendor capabilities. Then you can determine which vendor best supports your unique business outcomes.

In this section, we'll explore the six key focus areas you should consider when evaluating contact center vendors with an RFP tool. Evaluating these areas will also provide insight and context as to why each is important.

Let's get started.

RFP sections:

1. Introduction
2. Company
3. Core requirements
4. Omnichannel and journey management
5. Workforce engagement management
6. Security

Introduce yourself

Every RFP should start with information about your organization. The more you share, the better the vendor can customize their responses to answer your questions

In addition to providing some general information about your organization and contact center, describe your current technological state, the challenges you're facing and your desired future state. All this information will help you get the answers you need to make a good business decision.

This is also the best place to document your RFP process, including a complete timeline and key due dates.

What to include:

• Company overview

• Times and due dates

• Current state
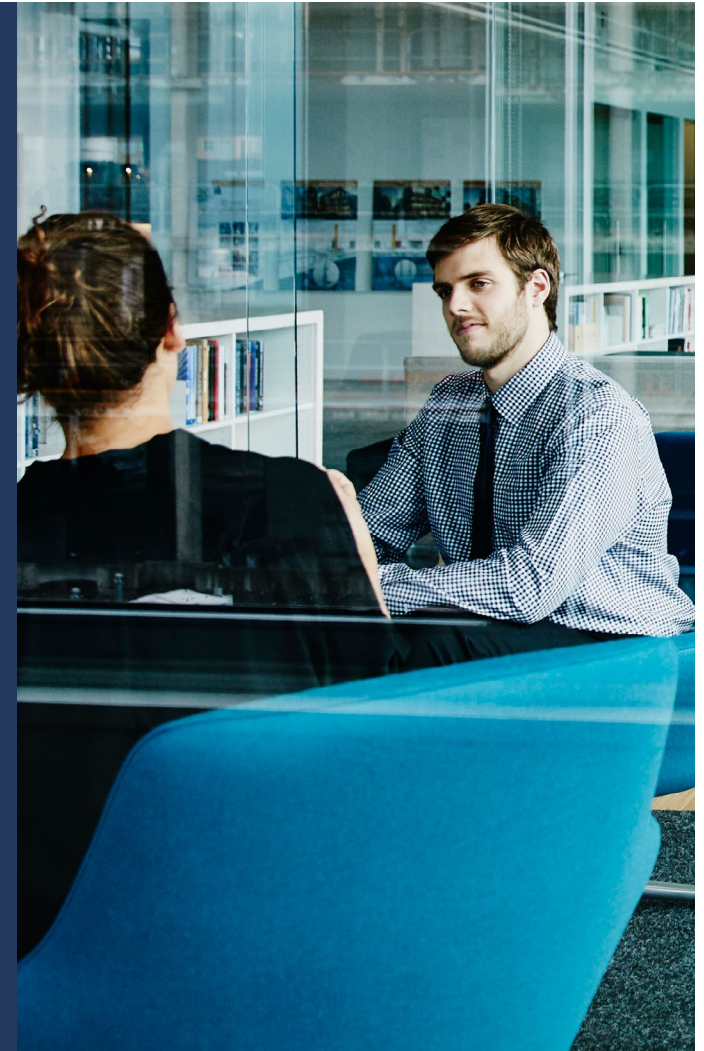
Company

When shopping for new contact center solutions, it's not enough to just look at the technology. Consider the company, its history, what it has to offer today and its roadmap for the future. You want a vendor who will partner with you for the long haul.

If your company does business in multiple countries, or plans to expand, does this vendor have global relationships? With increasing regulation of data access and telecommunications in different countries, unexpected delays can pop up unless the company has local partners in place that know the terrain and have existing projects. Additionally, check whether the product has the flexibility to set up separate rules and controls in different locales and offices to assure adherence.

And while there might be opportunities for negotiation in the future, it's best to get licensing, pricing and terms up front. Flexibility and options available can vary dramatically from vendor to vendor.

A reputable vendor will also help you manage your migration and any related changes. This is why it's important to ask about the professional services and support offered during and after your transition.

What to include:

- Company
- Legal and licensing
- Support
- Professional services

Questions to consider for the company section

Company	Legal and licensing	Support	Professional services
Describe your approach to R&D and annual percentage of revenue spend committed to R&D.	Terms and conditions must be negotiated in good faith. Please confirm acceptance.	Describe standard support available, including coverage and hours offered.	Describe your cloud migration strategy.
Please provide evidence of your financial stability.	What defines a billable user?	What is your release strategy for cloud upgrades?	Is there a single point of contact from your company throughout the implementation process?
What differentiates your cloud solution from competitors?	Does your license pricing offer any flexibility? Please describe.	Is standard or customized training available?	What documentation do you provide?
How many customers use your cloud solution? Please provide at least one company reference.	Can administrators access their organization's cloud usage information? Please describe.	Describe the help available within your cloud solution. Does it include in-app help files?	Describe how you control professional services costs and ensure timely delivery.
What is the Total Economic Impact (TEI) of your cloud solution?	What provisions are provided for customer retrieval of data upon contract termination?	What service levels are included?	Do you provide load testing to validate the cloud solution under peak load?

Core requirements

Not all cloud solutions are the same. So whether you're looking to move from an on-premises solution, a hybrid solution or another cloud contact center software solution, thoroughly investigating the core technology of any vendor is a must.

Be sure to compare and contrast the architecture and platform technology. Cloud-native platforms offer a lot more flexibility and capabilities to expand with your business.

The world is filling up with more data all the time, but data quality problems persist. A cloud-native platform should be able to sync data from many different systems and make it simpler to use that data — by finding relationships, identifying duplications and even normalizing some common data into ISO standards. Data should be available for all the internal systems and workflow tools without separate imports. Cloud systems should also give you API access to get any of your data back so you can use it in other internal systems, business intelligence or customer data platforms. It's [still] all about the data.

Look for an all-in-one platform that can be extended easily, offers continuous innovation delivery, and is accessible through a single interface and administration.

What to include:

- Architecture
- Administration
- User interface
- Platform
- Integrations
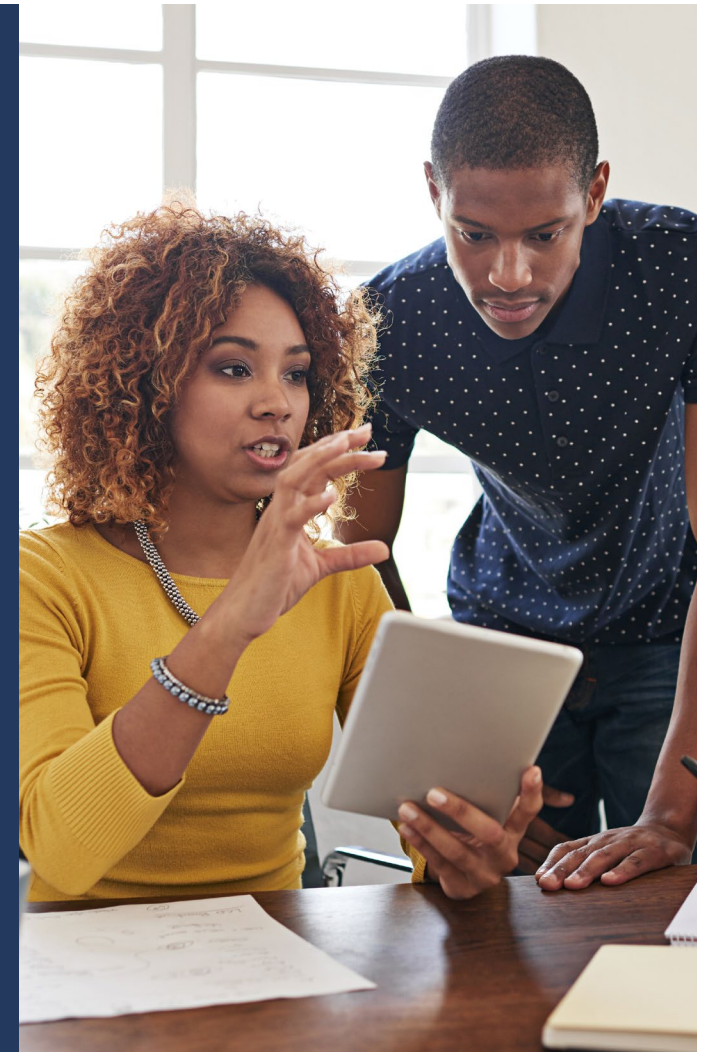
Questions to consider for the core requirements section

Architecture	Administration/user interface	Platform	Integrations
Provide an overview of the technical architecture.	Please provide an overview of the system administration capabilities.	Describe how the different applications that make up your cloud solution are integrated and work together.	What level of flexibility is offered in terms of what a customer can buy, build themselves or integrate with your solution?
What is the maximum agent capacity for a single domain?	Does your solution support single sign-on (SSO) with common vendors, as both subscriber and provider?	Describe your testing process and procedures and how you use automation to speed deployment of new capabilities.	What functionality for integration to third-party products is provided?
On which cloud infrastructure model does your solution run?	Does the solution have an intuitive, web/mobile-based user interface that's easy to use and deploy?	How is scale and seasonality managed? Do you support "cloud bursting?"	What packaged CRM integrations are available?
How is SIP integration supported? (For example, native SIP, session border controllers/gateways, etc.)	Do you provide tools for historical and real-time statistics regarding system performance against defined SLAs?	Do you support multiple telco options, such as integrated dial tone/carrier services or Bring Your Own Carriers (BYOC), with the option for local termination so a third party of your choice provides dial tone/carrier services?	Do you have an integration for dashboard and wallboard functionality?
What are the user desktop requirements?	How are home workers, remote (third-party) workers and mobile workers (field engineers) supported? Include any limitations with the number of users supported and global location limitations.	What is your platform roadmap strategy or direction?	How do you support data-dip integration?

Omnichannel and journey management

The cloud solution should enable a consistent, seamless and personalized next-generation customer experience through effective journey management.

To do this, you'll need single customer view across a multitude of digital channels. You'll also need the ability to use AI to route predictively, respond prescriptively and communicate proactively with customers.

You can't fully manage journeys without easy access to real-time reporting and historical – and actionable -- insights. Increased pipeline velocity, abandonment rates, established KPIs and time to resolution are just a few of the data points you'll want from your contact center software. Be sure to ask about the data you expect in your RFP or in conversations with a sales representative.

Core requirements sections:

- Digital channels
- Inbound/routing
- Outbound
- Reporting

Questions to consider for the omnichannel and journey management section

Digital channels	Inbound/routing	Outbound	Reporting
Describe how AI is applied.	How is skills-based routing supported?	Are outbound SMS campaigns supported?	What standard reports are provided?
Does your solution offer virtual agent (bot/AI) capabilities that automate intelligent responses without needing to queue to an agent?	Is callback functionality supported so customers/prospects can request a callback rather than waiting in a queue?	Are third-party web services for Do Not Call scrubbing supported?	Are real-time, on-demand and historical reporting features included? If so, provide details of the reporting and analytics capabilities.
Does the solution provide virtual agent technology to support customer interactions based on conversation or specific tasks?	Is VIP routing decision based on customer value (high/middle/low value) offered?	Can your solution perform post-call surveys?	Can data stored within the contact center platform be extracted to an enterprise data warehouse for further insights and analytics?
Do you offer the native ability to handle omnichannel engagement, including mobile, web, chat, phone, social, SMS, video and any future channels?	Does the solution provide IVR self-service or automation functionality? If so, what IVR development tool is provided?	How does the predictive dialer control inbound and outbound call flow? Describe how the algorithm works.	What KPIs are captured? For example, are KPIs like abandoned percentage, customers waiting and wait time available within reports and dashboards?
What web chat routing functionality is provided?	Is natural language speech recognition provided?	Are customer callback capabilities included?	Describe how supervisor dashboards are handled.

Workforce engagement management

For decades, contact centers have focused on optimizing efficiency and effectiveness to improve customer experience. And early workforce engagement management (WEM) tools reflected that. When you think about incorporating the latest WEM tools, don't lose sight of the person — and the value of an engaged employee.

Putting employee engagement first is the most direct path to improving customer experience. A cloud solution with proper WEM capabilities creates an employee-centric organization. It also can simplify operations and increase efficiency.

When thinking about WEM capabilities, there are three key areas you should explore. First, keep quality assurance and compliance simple with tools like interaction and screen recording, voice of the customer and the employee, and speech and text analytics. Next, you'll want to manage resources to improve operations. Tools that help here include workforce planning, scheduling and forecasting, and capacity modeling for cost prediction. Finally, put your employee performance center stage with gamification tools as well as learning and training and recognition.

WEM sections:

- Scheduling
- Forecasting
- Quality management
- Screen and integration recording
- Voice of the customer and the employee
- Speech and text analytics
- Employee performance management

Questions to consider for the workforce engagement management section

Scheduling and forecasting	Quality management	Screen/text/interaction recording and analytics	Employee performance management and voice of the customer and the employee
Is WFM historical and real-time schedule adherence supported?	What kind of quality management process is provided?	What are your standard storage timeframes within the cloud?	Describe any gamification and performance rewards built into the solution.
Are views into inbound, outbound and blended contact centers offered to provide a complete picture of adherence?	Are recording and quality evaluations for multiple interaction types, such as voice, email, chat, SMS and social included?	Provide an overview of your conversation transcription features, including search, transcriptions and languages.	Describe your survey capabilities.
What automated forecasting functionality is available for short term and long term? Include capabilities for chat, email and social media.	How does the quality management functionality ensure agent fairness in evaluations?	Can call recordings be searched by various attributes?	What supervisory capabilities are provided?
Are multisite operations that share work between locations supported?	Can sections of a call be pulled or flagged for review?	Are all interaction types recorded and can you analyze them for sentiment and emotion? This includes voice, email, chat, SMS, social and phone.	Can you create and enable automation to determine when to send surveys to customers?

Security

In a world crawling with data breaches and identify theft, you can't afford to overlook trust and security. In fact, security considerations should begin long before technology hits the contact center. Best-in-class security mechanisms are typically built from the ground up.

Security also should be a full partner to the development process. You should continually test and review code using a variety of tools and vulnerability assessments. Having these processes and tools ensures that appropriate fixes are in place to maintain a high security posture.

Look for products and services that are continually re-certified and re-registered — and in compliance with laws and regulations like the US Health Insurance Portability and Accountability Act (HIPAA) or GDPR. As you evaluate solutions, consider the vendor's change management practices. Strict policies protect against internal threats. This should also include built-in safeguards that limit access to your content repositories and the data you stored there.

Choosing a secure, trustworthy and compliant solution for your cloud-based contact center is worth the due diligence.

What to include:

- Compliance
- Data protection
- Information security
- Business continuity

Questions to consider for the security section

Compliance	Data protection	Information security	Business continuity
Which audits and certifications does the cloud solution comply with?	Does the cloud solution provide enterprise-grade security?	Provide your information security policies and procedures.	What is your cloud-based contact center infrastructure strategy for high availability?
Do you allow customers the right to audit your cloud solution?	Describe the virtual security of your cloud data center, including monitoring and processes in place for excessive, suspicious or unauthorized attempts to access.	Are intrusion tests performed on your cloud solution by a third-party company? If so, how often?	What is the business continuity plan for your cloud solution? Include your guaranteed recovery point objective and your recovery time objective.
How does your cloud solution provide for TCPA compliance and handle Do Not Call lists?	Is all customer data, including sensitive data, encrypted while at rest and in transit?	How do you protect against malicious internal data threats? Describe any built-in safeguards.	Is there an additional charge for geo-redundancy?
Describe how your cloud solution meets GDPR requirements.	Does your cloud application use web application firewall (WAF) products to protect against application-layer attacks? If yes, do you have documented configuration controls?	Describe, in detail, the protection used against Distributed Denial of Service (DDoS) attacks as part of your cloud solution. For example, do you use AWS Shield and load balancers?	Is the cloud architecture designed with inherent geo-redundancy with at least three data centers configured with active-active resiliency?
Is your cloud solution PCI-compliant?	Does the cloud solution offer multi-level, role-based and field-level security?	Describe your security incident response plan.	Does the cloud environment use multiple physical servers or a single server?

Summary

Deciding you need to level up your contact center software is the easy part. Knowing which vendor to partner with involves a bit more evaluation. A lot of vendors have viable solutions. The challenge is figuring out which of those solutions meet your unique needs.

Use an RFP to simplify the process, standardize your comparison of vendors and get the answers you need to make the best decision for your organization.

As you go through this process, keep Genesys in mind. We've delivered more than 70 billion experiences in over 100 countries with the power of cloud and AI. And we want to power your experiences, too.

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ⵂGENESYS™

ABOUT GENESYS

Every year, Genesys® delivers more than 70 billion remarkable customer experiences for organizations in over 100 countries. Through the power of the cloud and AI, our technology connects every customer movement across marketing, sales and service on any channel, while also improving employee experiences. Genesys pioneered Experience as a Service℠ so organizations of any size can provide true personalization at scale, interact with empathy, and foster customer trust and loyalty. This is enabled by Genesys Cloud™, an all-in-one solution and the world's leading public contact center platform, designed for rapid innovation, scalability and flexibility.