Microsoft Office User

Last Updated: February 7th, 2017

YOUR COMPANY NAME

Address 1  
Address 2  
City, State, ZIP  
www.yourwebsite.com

Request for Information  
VoIP Phone System

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# Company Overview:

Please detail an overview of your company’s history.

**OUR MISSION** please provide your mission statement

**OUR VISION** please provide your vision statement

# Format and Instructions:

The format of this RFI is broken down into the following sections:

* Project Team Contact Information – contains contact information for all members of the Project Team
* Project Timeline – details the various stages & associated dates/times for each stage
* **\***Current Environment – details specifications surrounding the issuer’s current VoIP environment
* **\***Supplier Information – contains contact & other relevant business information for the Supplier
* **\***Requirements & Specifications – details the various requirements & specifications needed for the issuer’s next generation VoIP telephone system
* **\***Exhibits – provides a list of additional documents that the issuer is requesting from each Supplier

Supplier will be responsible for completing the sections marked with an asterisks (**\***) in the bulleted list above. Instructions on how to complete each section are contained in the overview of each section respectively.   
  
All questions, inquiries, & correspondence should filter through the Project Coordinator (PC NAME) & Project Sponsor (PS NAME) whose contact information is provided in the Project Team Contact Information section. Suppliers will submit their completed RFI electronically to the Project Coordinator & Project Sponsor no later than the deadline (RFI submission date) detailed in the Project Timeline section.

# Project Team Contact Information:

The following consists of contact information for all the issuer staff members that will be involved in the RFI process. Information includes their current title at the issuer, their role within the RFI process (and overall VoIP project), business phone number & email.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Title | Role | Phone | Email |
|  |  |  |  |  |
| NAME | Title | Project Sponsor | Phone number | [email@domain.com](mailto:mscudder@millenniumsi.com) |
| NAME | Title | Technical Project Lead | Phone number | [email@domain.com](mailto:mscudder@millenniumsi.com) |
| NAME | Title | Project Manager | Phone number | [email@domain.com](mailto:mscudder@millenniumsi.com) |
| NAME | Title | Project Coordinator | Phone number | [email@domain.com](mailto:mscudder@millenniumsi.com) |
| NAME | Title | Accounts Payable/Receivable  Budget/Costs | Phone number | [email@domain.com](mailto:mscudder@millenniumsi.com) |
| NAME | Title | Subject Matter Expert (SME) for CRM | Phone number | [email@domain.com](mailto:mscudder@millenniumsi.com) |

# Project Timeline:

The following table provides timeframes & a description for each of the various stages in the RFI process.

|  |  |
| --- | --- |
| Dates | Stage |
| Date or Date Range | Submission of RFI to suppliers |
| Date or Date Range | Individual conference calls with suppliers to address any/all questions regarding RFI |
| Date or Date Range | Suppliers submit completed RFI’s to the issuer |
| Date or Date Range | the issuer Review of completed RFI’s & proposed solution (Preliminary) |
| Date or Date Range | Demonstrations of suppliers’ solution |
| Date or Date Range | Creation of RFP for supplier finalists |
| Date or Date Range | Question and Answer period for RFP |
| Date or Date Range | RFP Submission |
| Date or Date Range | RFP Review |
| Date or Date Range | Final Decision |

# Current Environment:

The following table provides details surrounding the various applications the issuer currently uses with their current supplier (NAME). The following columns provide the name of the application, description of the application (with current version number) and the # of users.

|  |  |  |  |
| --- | --- | --- | --- |
| Application | Description | Version | # of Users |
| Application Name | Description of Application | Version | XX |
| Application Name | Description of Application | Version | XX |

The following table provides details surrounding the various phones (devices) that the issuer currently uses with their current supplier (NAME). The following columns provide the name of the device, description of its use and the # of users.

Please indicate whether or not the current devices are compatible with your proposed solution by marking “Y” or “N” in the “Compatible Y/N” column. In addition, please indicate whether or not there are buy back options by marking “Y” or “N” in the “Buy Back Option (Y/N)” column.

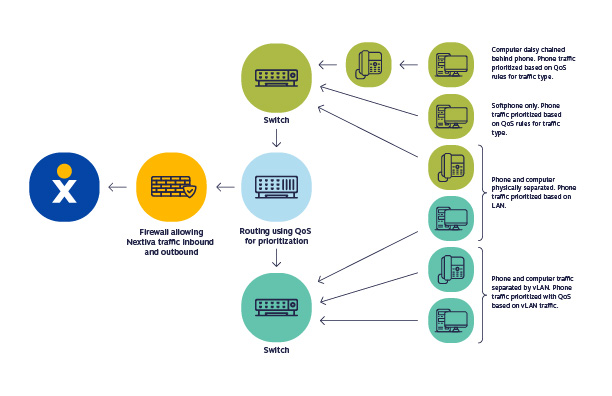
|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Model | Description | # of Users | Compatible (Y/N) | Buy Back Option (Y/N) |
| Phone Model | Used by standard users | XXX | **(Y/N)** | **(Y/N)** |
| Phone Model | Used by advanced users (receptionists/executives) | XXX | **(Y/N)** | **(Y/N)** |

The following table & graphic provides details surrounding the environment that currently supports the issuer’s current system (NAME). The following columns provide a high level overview of categories & specifics (description) surrounding the environment.

|  |  |
| --- | --- |
| Category | Description |
| Voice Circuit | Describe the internet that you plan to supply to the phones, and whether or not it is dedicated to the phones or shared with the computers |
| ISP | Please indicate the current supplier of the internet to the above Voice Circuit |
| Network (Hardware) | Please detail Firewalls and/or routers and Switches |
| Network (Bandwidth) | Please detail bandwidth limits for the internet, as well as for chokepoints on the network |

Take a moment and describe the pain points that your current environment causes your business and solicit an open-ended response on how the supplier can resolve these pain-points and add value to your business.

Replace this image with your current network infrastructure design



# Supplier Information:

Please complete the form below. The primary contact will serve as the main point-of-contract for the Supplier throughout the RFI process.

|  |  |
| --- | --- |
| Primary Contact Name |  |
| Company Address |  |
| Business Phone Number |  |
| Email Address |  |

Please complete the form below. the issuer is requesting additional information about the company as it pertains to reputations, financials & incorporation. If any of the information isn’t applicable or isn’t currently being tracked, please enter “N/A” as your response into the related field.

|  |  |
| --- | --- |
| Name of Business Entity |  |
| Type of Corporation |  |
| State of Incorporation |  |
| Federal Tax ID |  |
| Federal Tax ID |  |

# Requirements & Specifications:

The following table contains specific requirements & specifications for the issuer’s next generation VoIP phone system. The following columns provide the category of the various requirements, a description of each requirement, whether the requirement is available/not available and notes. Suppliers are instructed to read through the various requirements and indicate whether or not their solution is available or not available by entering an “X” into the appropriate column. The notes field should be used to provide any additional information that the Supplier feels is relevant to their assignment for that requirement. An example of a note that may support a requirement that is marked as “Not Available” may be “On the Product Roadmap – Q4.”

**Add or remove categories or features as needed**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Category | Requirement | AVAILABLE | NOT AVAILABLE | Notes |
| Core System Functionality |  | | | |
| System shall provide the ability to park a call to an extension and then to connect back to the parked call extension | |  |  |  |
| Allow user set “do not disturb” route calls to voicemail | |  |  |  |
| Ability to direct incoming call to voicemail | |  |  |  |
| System shall provide ability to forward current call to another extension and to an external number | |  |  |  |
| System shall provide ability to place current call on hold, connect to another extension, and then forward the on hold call to the extension | |  |  |  |
| System shall allow users to set their own name and voicemail greeting | |  |  |  |
| System shall allow users to set their own vacation voicemail greeting along with start date and end date for the vacation greeting | |  |  |  |
| System can allow users to get a different greeting for internal and external callers | |  |  |  |
| System shall use the same password for accessing voicemail on handset and accessing any system self-service web portals | |  |  |  |
| System can provide ability for self-password reset | |  |  |  |
| System can provide integration to Active Directory | |  |  |  |
| System shall provide multiple levels of password security rules and complexity requirements | |  |  |  |
| System shall provide ability to require billing code prior to allowing a long distance call | |  |  |  |
| Desktop Phone |  | | | |
| Desktop phone shall have standard dialing 0-9, \*, #, volume and mute controls | |  |  |  |
| Desktop phone shall support Power Over Ethernet (802.3af) via a network switch | |  |  |  |
| Desktop phone shall accept 10/100/1000 Ethernet and provide at least 1 10/1001000 Ethernet for optionally connected desktop or other LAN devices | |  |  |  |
| Desktop phone shall support full duplex speakerphone capabilities | |  |  |  |
| Desktop phone shall have a prominent visual voicemail indicator | |  |  |  |
| Phone display shall provide incoming caller ID number and name | |  |  |  |
| Desktop phone shall have the ability to forward incoming call to voicemail | |  |  |  |
| Shall have a color display | |  |  |  |
| Shall utilize adaptive menus that provide user-friendly button names | |  |  |  |
| Shall support at least 4 extensions and an optional “side car” to support up to 20 additional lines/extensions | |  |  |  |
| Shall have a quick access button to voicemail | |  |  |  |
| Shall have the ability to connect external headset | |  |  |  |
| Shall maintain list of inbound calls that user can retrieve via phone | |  |  |  |
| Shall maintain list of outbound calls that user can retrieve via phone | |  |  |  |
| Shall have a “corporate directory” to quickly lookup by first/last name any internal extension. | |  |  |  |
| Shall have at least two user-programmable keys for speed dialing an internal extension or an external number | |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Category | Requirement | AVAILABLE | NOT AVAILABLE | Notes |
| Softphone |  | | | |
| Softphone client should run on current (N) and prior (N-1) Windows operating system. (As of May 2013 this requirement is Windows 8 and Windows 7.) | |  |  |  |
| Softphone client should support 32-bit and 64-bit versions of operation systems | |  |  |  |
| Softphone client should run on current (N) and prior (N-1) Apple operating system. (As of June 2013 this requirement is OS X 10.8 and OS X 10.7.) | |  |  |  |
| Softphone client laptop shall not require a registration tied to a specific IP address. A registered client shall be able to connect from any IP address | |  |  |  |
| Describe softphone options for Android smartphones | |  | | |
| Describe softphone options for Apple smartphones | |  | | |
| Voicemail |  | | | |
| Shall provide ability to forward voicemail message to another extension | |  |  |  |
| System shall have the option to email and/or SMS text a user on arrival of new voicemail | |  |  |  |
| System shall provide the ability to configure voicemail message notification groups | |  |  |  |
| Voicemail notification groups can require a PIN to send message | |  |  |  |
| Voicemail system shall provide an option to “0” out to an operator or centralized answering station | |  |  |  |
| Category | **Requirement** | **AVAILABLE** | **NOT AVAILABLE** | **Notes** |
| Auto Attendant |  | | | |
| System shall have option to dial by name to lookup an employee’s extension | |  |  |  |
| System shall have the capability to provide nested options and play different types of announcements (i.e. directions to 777 North Capitol) | |  |  |  |
| Ability to change recordings based on time of day | |  |  |  |
| System shall have the ability to have an overriding message in the event of an emergency or disaster to announce closures or other critical information | |  |  |  |
| Call Center (IPCC) |  | | | |
| System shall allow multiple phone tree options that automatically adjust on a pre-set schedule (day of week or time of day) | |  |  |  |
| System shall provide multiple incoming call options to include: Round-robin to any extension logged in | |  |  |  |
| System shall provide multiple incoming call options to include: Ring group to all extensions logged in | |  |  |  |
| System shall provide multiple incoming call options to include: Hunt group to extensions logged in | |  |  |  |
| System shall provide customizable hold music or informational recordings | |  |  |  |
| Message to provide caller with estimated wait time | |  |  |  |
| Ability to forward all calls to remote location or cell number in the event of emergency or disaster | |  |  |  |
| Category | **Requirement** | **AVAILABLE** | **NOT AVAILABLE** | **Notes** |
| Teleconference |  | | | |
| Ability for host to self-schedule conference bridge and set PIN in advance of conference call | |  |  |  |
| Teleconference shall offer option of toll-free or long distance numbers for participants | |  |  |  |
| System shall provide a DC-local number for participants | |  |  |  |
| System shall support conference size up to 20 participants | |  |  |  |
| Describe any limits to the maximum number of participants in a single conference. Describe options if dedicated conference bridge is required | |  |  |  |
| Describe any limits to the maximum number of participants concurrently across multiple active conferences | |  |  |  |
| System shall provide ability for host to monitor conference via web interface to perform key functions such as mute-one, mute-all, etc. | |  |  |  |
| System can provide ability to record conference call | |  |  |  |
| System can provide video conferencing and document sharing/presentation capability | |  |  |  |
| Ability to conduct a survey to participants after a call | |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Category | Requirement | | AVAILABLE | NOT AVAILABLE | Notes |
| Integration |  | | | | |
| Describe integration options with Microsoft Skype for Business (Office 365) | | |  | | |
| Describe integration options with Salesforce | | |  | | |
| Describe integration options with Office 365 and unified messaging, including FAX capability | | |  | | |
| Describe integration options with Internet Explorer | | |  | | |
| Describe integration options with Safari | | |  | | |
| Describe integration options with Chrome | | |  | | |
| Provide details of any other computer telephony integration (CTI) with additional apps that are not listed here | | |  | | |
| Miscellaneous |  | | | | |
| Ability to prompt user to complete survey at completion of the call | | |  |  |  |
| Overhead paging system capabilities | | |  |  |  |
| Intra-Day Report (Voice, Chat, E-mail): Metrics necessary to measure Customer Satisfaction | | |  |  |  |
| Providing summaries of C-SAT results on a configurable basis | | |  |  |  |
| Category | | **Requirement** | **AVAILABLE** | **NOT AVAILABLE** | **Notes** |
| Ability to support multi-lingual communications with customers | | |  |  |  |
| Forecasting: Planning – ability to use historical data available in order to accurately forecast call volume, handle time and staff shrinkage by interaction type | | |  |  |  |

# Exhibits:

the issuer is requesting that the Suppliers provide the additional documents listed below. These documents should be inserted into the subsequent sections of the RFI that reference each exhibit respectively.

1. Network & Systems Diagram of key VoIP Components
2. Terms of Service (ToS)

# Exhibit A – Network & Systems Diagram:

# Exhibit B – Terms of Service (ToS):