

# STATE OF UTAH



## **SOLICITATION NO. DG8018**

REQUEST FOR INFORMATION - Current State of the Art Call Center Technology

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RESPONSES ARE DUE PRIOR TO:

**Mar 31, 2008 5:00:00 PM MDT**

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RESPONSES MAY BE SUBMITTED ELECTRONICALLY TO:

[www.rfpdepot.com](http://www.rfpdepot.com)

RESPONSES MAY BE MAILED OR DELIVERED TO:

State of Utah  
Division of Purchasing  
3150 State Office Building, Capitol Hill  
Salt Lake City, Utah 84114-1061

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Bid DG8018  
REQUEST FOR INFORMATION - Current State of the Art Call  
Center Technology

Bid Number DG8018  
Bid Title REQUEST FOR INFORMATION - Current State of the Art Call Center Technology

Bid Start Date Mar 3, 2008 10:47:46 AM MST  
Bid End Date Mar 31, 2008 5:00:00 PM MDT

Bid Contact Debbie Gundersen  
801-538-3150  
dgundersen@utah.gov

Contract Duration See Specifications  
Contract Renewal Not Applicable  
Prices Good for Not Applicable

Bid Comments THIS IS NOT A BID. DO NOT SUBMIT PRICING. THIS IS A REQUEST FOR INFORMATION ONLY. SEE ATTACHED RFI FOR ADDITIONAL DETAILS.

Item Response Form

Item DG8018-1-01 - Request for Information - Current State of the Art Call Center Technology  
Quantity 1 lot  
Prices are not requested for this item.  
Delivery Location State of Utah  
No Location Specified  
Qty 1

Description  
Request for Information for Current State of the Art Call Center Technology and Products.

DO NOT SUBMIT PRICING AS PART OF THIS REQUEST FOR INFORMATION.

See attached RFI for Details.

RFI Response should be submitted to:

Janis Race-Bigelow  
Telecommunications Supervisor  
Department of Technology Services  
140 East 300 South  
Salt Lake City, Utah 84111

By the due date listed above.

February 27, 2008

RE: REQUEST FOR INFORMATION (RFI) – DG8018

To all interested vendors:

The Department of Technology Services, Department of Workforce Services Field Office, wishes to survey the marketplace to learn about current state-of-the-art Call Center technology and products.

Questions about this RFI and RFI Responses should be directed to:

Janis Race-Bigelow  
Telecommunications Supervisor  
Department of Technology Services  
140 E 300 S  
Salt Lake City, UT 84111

Desk: 801-526-9393  
FAX: 801-526-9250  
Email: [jrace-bigelow@utah.gov](mailto:jrace-bigelow@utah.gov)

All responses are requested by the close of business on **March 31, 2008**

**STATE OF UTAH  
REQUEST FOR INFORMATION (RFI)  
CALL CENTER TECHNOLOGY AND SERVICE  
February 27, 2008**

**Department of Technology Services – Dept of Workforce Services Field Office  
Call Center Technology and Service**

**PURPOSE**

The purpose of this request for information is to identify vendors with experience and expertise in Phone Technology, Products, and Services.

**BACKGROUND**

The Department of Workforce Services (DWS) is one of the largest departments within Utah State Government. DWS provides support functions for Utah residents. DWS has two (2) branches that provide a variety of services to customers: Eligibility Services and Unemployment Insurance (UI).

**Eligibility Services**

Eligibility Services include services such as: job referrals, resume writing, job search, career counseling, labor market information, assessment, employment planning, job development, veterans' services, workshops, employment and training, child care, financial, medical, and food assistance.

Eligibility Services is divided into five (5) geographical regions with offices located throughout the State. DWS has approximately 2,000 employees who provide eligibility services to approximately 110,000 households.

Eligibility Services has three (3) call centers that interview customers for public assistance programs. The call centers are located in Salt Lake City, Ogden and St. George. Currently the call centers provide different levels of support for customers, but the long-term goal is to have a unified environment so all Regions, Offices and Teams use the same processes and procedures.

**Unemployment Insurance (UI)**

UI is temporary income assistance for individuals who are unemployed through no fault of their own. Claimants file new and weekly claims through a web-based application or a telephone IVR application. Those who elect to file claims through the web are able to complete the filing process without talking to a DWS staff member. Those who elect to file using the telephone can complete parts of the process, but must speak with a DWS staff member when filing a new claim.

UI has one call center located at the DWS Administration North building. This call center takes claims and provides support for claimants who have questions or need assistance. This call center provides support to Utah claimants whether or not they reside in Utah.

The UI call center is referenced in this RFI for the purpose of making any prospective vendor aware of the current DWS call center environment and telephony infrastructure and the fact that there is currently shared software and hardware between the CRESC and the UI

call centers. It is not intended that the UI call center would be otherwise connected to the three (3) eligibility call centers as described under the “Purpose of the services or efforts to be performed” section below.

The Department of Technology Services (DTS) is responsible for assisting internal and external customers to plan and implement improved technology services. DTS promotes a competitive bidding process for contracts outside the parameters of development they provide in-house.

## **DEPARTMENT OF WORKFORCE SERVICES’ ELIGIBILITY SERVICES BUSINESS ENVIRONMENT**

Eligibility Services currently operates three (3) call centers that utilize two (2) telephone systems. The Central Region Eligibility Service Center (CRESC, Salt Lake City) and the Customer Application and Support Helpdesk (CASH, Ogden) utilize AVAYA telephone switch technology. The Tri Region Area Call Center (TRACC, St. George) uses a Telrad telephone switch technology.

One system and one phone number is needed to distribute calls throughout the State with the ability to interface with our operating system (eREP).

## **ANTICIPATED FUNCTIONALITY OF THE CALL CENTER TECHNOLOGY AND SERVICES:**

Purpose of the services or effort to be performed:

1. Connect the three (3) call centers, regions, offices, teams, individual workers and auxiliary support systems (Central Imaging Unit and Central Business Office) to a single phone system.
2. Distribute call volume throughout the State to regional offices or workers within an office.
3. Auxiliary support as back-up for high call volume times.
4. Disaster recovery plan for phone system.

## **Description of Potential Services to DTS-DWS if an RFP is later issued:**

### **Software Application**

1. Disposition – Pop up box appears on workers screen when call is answered for worker to enter call type (call types would be predetermined).
2. Scheduler (forecasting) – Forecasts schedule based on but not limited to; history, breaks, lunches, and meetings. Based on data entered and call history, system would forecast schedule for workers and recommend optimal staffing levels.
3. Customer contact by emails will be routed and prioritized in the phone system queue.
4. The phone system will interface with eREP to access and display customers’ case information on the workers screen when call is answered.
5. Option for computer based training to populate during low call volume times.
6. Phone operating system must connect with eREP.
7. All of the above must also support a telecommuting environment.

## Reports

1. Reporting capability on real-time data for operating supervisors and managers to manage resources and workflow (including amount of work produced and total cycle time during and after workflow).
2. Reporting capability of historical data for operating supervisors and managers for schedule forecasting.
3. Reporting capability, to include but not limited to call volume by: time of day, week, month, length of call, and type of call.
4. Reporting to include but not limited to; individual agents, groups of agents, teams, offices, regions and statewide.

## Telephone System

1. Call Back – Customer has the option to disconnect and have the system automatically call the customer back at the number they provide when their place in the queue is reached.
2. Hold message is *individualized* for each case. Hold message would be connected to eREP to educate customer on services and case information.
3. Re-queue – Transfer customer to Spanish worker, the customer would be moved to the front of the Spanish queue.
4. Customers speaking languages other than English or Spanish, system will generate call automatically to the Language Line.
5. Logic to prioritize call routing by workload and / or customer's profile. Profile to include; zip code, or information gathered from interface with operating system (eREP).
6. Service Priority Queue – Determined by the IVR and prioritized service.
7. Technology re-directs customer to the same agent previously called within a predetermined time frame.
8. System will track calls made during established time frames by telephone number and call type and will queue staff.
9. Based on security rights, ability for workers (telecommuters, outreach, residential, etc) to have remote access to system.
10. Option for system to generate call to customers to notify of approval or denial of benefits.
11. Call routing based on worker experience and expertise.
12. Call routing based on customer eREP profile and worker specialty.
13. Graphical User Interface (GUI) allows customization of messages for workers within a call center or statewide.
14. Disaster recovery system.

## Call Monitoring

1. Option to record call(s) being monitored.
2. System sends messages and banners to workers. This can be used to let everyone know how many calls are in queue and call statistics.
3. Service Observe capable (monitoring). Call observer screen must mimic the worker's active screen(s) without the worker's detection.
4. Marquee visible to all staff to notify of call statistics.
5. Auto-In: Management should have the ability to auto-in workers during high call volume times (for backup).

**Interactive Voice Response (IVR)**

1. Voice over internet protocol (VoIP) capable.
2. IVR Applications – system that would allow customers to initiate and/or complete an application/review for services over the phone (61APP and Reviews – see attached).

**Maintenance and Support Contracts**

Maintenance options for hardware and software should indicate types of maintenance contracts available, options for support during and after-business hours and response times for options.

**Definitions:****eREP**

Web based multi-agency data base that collects eligibility information for multiple federal and state public assistance programs.

**Central Imaging Unit (CIU)**

The CIU is a central location where documentation (via mail, fax, email or interoffice mail) is turned in to be imaged to customer electronic case files.

**Central Business Office (CBO)**

The CBO takes payments via credit /debit cards for internal and external customers, issues temporary medical cards, and activates emergency electronic benefit transfer (EBT) cards for external customers.

**Language Line**

Workers utilize this contract for translation services when working with non-English speaking customers.

**Other Requirements:**

1. Contractor would be responsible for providing support on above mentioned services.
2. DWS will provide information on service delivery model.
3. DTS will provide information on current infrastructure.
4. All services and support must be located and provided in the United States. Local level support is preferable.
5. Respondents are requested to provide detailed descriptions of services available and explain how their product meets our service needs as outlined above.
6. The Department of Workforce Services welcomes a creative approach and broad perspective to meeting the requirements of this RFI. Please share any input or recommendations you have that would assist us in reaching the objectives of this RFI.



## **ATTACHMENT A: Technology Environment**

### **DEPARTMENT OF WORKFORCE SERVICES' TECHNICAL ENVIRONMENT**

#### **Interactive Voice Response System (IVR)**

Nortel MPS 1000 release 2.1. will be upgraded to 3.0 before 1 July 08. Located at 140 E 300 S, Salt Lake City, UT

#### **Remote Access (Telecommuters) for Central Region Eligibility Service Center (CRESC) and Customer Application and Support Helpdesk (CASH) and Tri Region Area Call Center (TRACC)**

Computer Hardware/Software: Telecommuters use a CD to boot their systems to the DWS Instant Virtual Extranet (IVE). They complete all work activities from this IVE including logging into the telephone switch. The machines will not have hard drives. All applications must be able to be accessed through IVE.

Telephone connection: Telecommuters use the AVAYA IP Agent to connect to the switches that support CRESC (Workforces Services – Admin Main) and CASH (Ogden Regional Center). Telecommuters for the TRACC (St. George) would utilize the Telrad solution.

WAN Connectivity: The preferred provider for telecommuter access is the Utah ISP MegaCentral network provided through a contract with Qwest. This is a DSL connection. Employees not eligible for MegaCentral generally use Comcast if they are in that provider area or their local telecom DSL provider

#### **Telephone Equipment**

CRESC workers use AVAYA Callmaster III or IV, AVAYA 6416, or Callmaster IV emulation if workers telecommute.

CASH employees are using some AVAYA Callmaster IVs and some AVAYA 6416s.

TRACC employees are using Telrad Avante series phones.

#### **Computer Equipment**

Telecommuters are provided with a desktop that does not have a hard drive and boots to a CD for security reasons.

Employees utilize HP desktop that is no less than 4 years old.

**OFFICE PHONE SERVICE:** Offices have different types of phone equipment. The following list defines each office support system including phone system, voicemail system and ACD.

B	C	D	E	F	G	H	I	J
Type	Agency	Address	City	Phone System	Voicemail System	Automatic Call Distribution (ACD) and/or Call Management System (CMS)	Call Center (ACD Licenses on the PBX)	
Key System	Human Services/Workforce Services	751 East 700 South	American Fork	Telrad IPeX 400	emaGEN	Basic ACD	10 licenses	
Key System	Human Services/Workforce Services	875 N Main	Beaver	Telrad IPeX 60	emaGEN			
Key System	Human Services/Workforce Services	544 N 100 E	Blanding	Telrad IPeX 400	emaGEN			
Key System	Human Services/Workforce Services	1050 S Medical Drive	Brigham City	Telrad IPeX 400	emaGEN			
Key System	Workforce Services	1020 North 550 West Hwy 29	Castle Dale	Telrad IPeX 128	emaGEN LE64			
Key System	Human Services/Workforce Services - Emery County	176 East 200 North	Cedar City	Telrad IPeX 128	emaGEN	Basic ACD & Nova Wizard Pro	60 licenses	
Key System	Workforce Services	1290 East 1450 South	Clearfield	Telrad IPeX 400	emaGEN			
Key System	Workforce Services	69 North 600 West	Heber	Telrad IPeX 128	emaGEN			
Key System	Workforce Services	468 East 300 South	Kanab	Telrad IPeX 128	emaGEN			
Key System	Workforce Services	180 North 100 West	Logan	Telrad UNITE IPeX2	emaGEN			
Key System	Workforce Services	55 S. Main St.	Manti	Telrad UNITE IPeX2	emaGEN			
Key System	Workforce Services	457 W Kane Creek Blvd.	Moab	Telrad IPeX 128	emaGEN			
Key System	Workforce Services	625 N. Main	Nephi	Telrad IPeX 60	emaGEN			
Key System	Workforce Services	1960 Sidewinder Ave, #202	Park City	Telrad IPeX 60	emaGEN			
Key System	Workforce Services/HS - DCFS	475 W. Price River Drive, # 262	Price	Telrad IPeX 400	emaGEN	Basic ACD & Nova Wizard	20 Licenses	
Key System	Workforce Services - Richfield Regional	201 E 500 N	Richfield	Telrad IPeX 128	emaGEN			
Key System	Workforce Services	115 East 100 South	Richfield	Telrad IPeX 128	emaGEN			
Key System	Human Services/Workforce Services	140 W 425 S	Roosevelt	Telrad IPeX 400	emaGEN			
Key System	Workforce Services	5400 South 1950 West	Roy	Telrad IPeX 128	emaGEN	Basic ACD & Super Novae	60 licenses	
Key System	Workforce Services	1185 N. Chappel Drive	Spanish Fork	Telrad Unite 128	emaGEN	Basic ACD & Super Novae IQ II Total Logic	60 licenses	
Key System	Workforce Services	162 North 400 East, Bldg B	St. George	Telrad IPeX 400	emaGEN			
Key System	Workforce Services	40 South 200 East	St. George	Telrad IPeX 128	emaGEN			
Key System	Human Services/Workforce Services	305 N Main Ste 100	Tooele	Telrad IPeX 400	emaGEN			
Key System	Workforce Services	1050 West Market Dr.	Vernal	Telrad IPeX 128	emaGEN			
Key System	Workforce Services	2750 South 5600 West	West Valley City	Telrad Unite 128	emaGEN	Basic ACD & Super Novae	30 licenses	
Key System	Workforce Services	700 South 763 West, Bldg A	Woods Cross	Telrad IPeX 128	emaGEN	Basic ACD & Super Novae	30 licenses	
Key System	Workforce Services	44 S 350 E	Delta	Tadiran Coral II Communication Manager (CM) 3.1	Callware			
PBX	Workforce Services - Admin (Main)	140 E 300 S	Salt Lake City		Intuity Audix 4.4	Utilizes DTS' Centralized CMS	9.1/Elite/500 Agents	
PBX	Workforce Services - Midvale (EPN off of the Workforce Svc. Admin Main PBX)	7292 S State Street	Midvale	N/A	N/A			
PBX	Workforce Services - Murray (EPN off of the Workforce Svc. Admin Main PBX)	120 W Vine St	Murray	N/A	N/A			
PBX	Workforce Services - Ogden	480 27th Street	Ogden	Definity V10	Intuity LX		Pre 8.1/Stdndr/12 Agents	
PBX	Workforce Services - Provo	1550 N Freedom Blvd.	Provo	Definity V10	Definity Audix 3.1		Pre 8.1/Deluxe/25 Agents	
PBX	Workforce Services - Expomart	158 S 200 W	Salt Lake City	Definity V10	Intuity LX		Pre 8.1/Stdndr/12 Agents	
PBX	Workforce Services - South County	5735 S Redwood Road	Salt Lake City	Definity V11	Intuity LX		Pre 8.1/Stdndr/500 Agents	
PBX	Workforce Services - Metro	720 S 200 E	Salt Lake City	Definity V11.1	Intuity LX		Pre 8.1/Stdndr/500 Agents	
PBX	Workforce Services - Central Region	1385 S State Street	Salt Lake City	Definity V11.1	Intuity LX		11.1/Deluxe/50 Agents	
PBX	Ogden Regional Center (Workforce Services)	2540 Washington Blvd	Ogden	Communication Manager (CM) 3.1	Intuity 5.1		Pre 8.1/Stdndr/100 Agents	
PBX	Provo Regional Center (Workforce Services)	150 E Center Street	Provo	Definity V9 (will be upgraded to a CM 5.0 during FY-08)	Intuity 5.1		Pre 8.1/Stdndr/150 Agents	

Department of Technology Services – Dept of Workforce Services Field Office  
 State of Utah RFI – Call Center Technology and Support

**Notes:**

1. UI Call Center is located in the Workforce Services – Admin (Main) building.
2. CIU and CBO are located in the Workforce Services – Midvale building.
3. CRESC is located in the Workforce Services – Murray building.
4. CASH is located in the Ogden Regional Center.
5. TRACC is located in the Workforce Services St. George building.

Department of Technology Services – Dept of Workforce Services Field Office  
State of Utah RFI – Call Center Technology and Support