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Solution Requirements

Telephone and Contact Center System

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**Document Ownership Information**

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# Introduction and Background

The National Insurance Board is seeking a vendor for an integrated Telephone and Contact Center solution which will:

* Improve communications between The National Insurance Board and all Stakeholders.
* Improve the efficiency in how telephone calls are answered.
* Support the establishment of a quality monitoring program for call handling.
* Provide real time and historical data to facilitate management decision making and reporting.
* Allow for a workforce management program for call handling.
* Allow for users to have more control in call routing and messaging in real time.
* Enhance communication and support multimedia and multichannel communications.
* Connect the Family Islands to New Providence more efficiently.

The following document defines the requirements for this solution.

All vendors must complete and return the Functional & Non-Functional Requirements matrix in Section 3, to the National Insurance Board along with their proposal.

#  General Requirements

## Vendor Experience

The vendor should have documented experience in the implementation of telephone and contact center solutions and the interfacing of such solutions with enterprise applications.

## Technology & Standards

The solution should utilize widely-adopted and proven technologies which were developed by leaders in the telephone system and contact center market.

The solution should follow industry best practices for telephone systems and contact centers, and should conform to applicable industry standards.

## Architecture

The solution must include a set of primary core components to be located at the National Insurance Board headquarters in Nassau, and a set of backup/redundant core components to be located at site of NIB’s choosing on Grand Bahama. The solution must be configured to allow easy failover of services and users to the backup site in the event that the primary site is unavailable.

The solution must connect all users at the National Insurance Board headquarters in Nassau, as well as all users at the three (3) NIB sub-offices located on New Providence and the twenty-seven (27) NIB sub-offices in the Family Islands.

## Future Growth and Enhancements

The solution should allow for additional extensions and sites to be added with minimal effort. The vendor must affirm that a seven to ten-year roadmap for product enhancements exists and is in place.

## System Requirements

The solution should satisfy the Functional & Non-Functional Requirements as specified in the Section 3.

## System Maintenance

The solution should require minimal effort by NIB information technology staff to administrate, backup, and maintain. Product updates to the solution’s software and firmware components should not have a significant impact on the operation of the solution.

## Licensing and Devices

The solution should have a multi-level user licensing structure based on functionality; thereby allowing the tailoring of the purchased licenses to our user demographic.

The table below summarizes the different categories of users.

|  |  |
| --- | --- |
| **User Category** | **Initial Count** |
| Users who require only voice calls via a desktop device. | 550 |
| Users who require voice calls via a mobile device. | 100 |
| Users who require voice and video calls. | 50 |
| Call agents in the Call Center. | 20 |
| Supervisors and managers in the Call Center. | 6 |
| **Total** | **726** |

The solution must include at least eighty (80) new desk devices for call center and power users, which allows the users to access all of the features available under their license.

## Professional Services

The selected vendor will be required to perform the following professional services:

1. Installation and setup the solution’s hardware and software components.
2. Configuration of the solution to NIB’s specification.
3. Assistance with process and procedural development for contact center operations.

## Training

The selected vendor will be required to conduct on-site targeted training courses for the following user groups:

1. NIB call center supervisors and managers. (6 persons)
2. NIB call center agents. (20 persons; 16 in New Providence + 4 in Grand Bahama)
3. NIB information technology staff administrating the solution. (10 persons)
4. NIB power users. (20 persons)

## Documentation

The selected vendor will provide the following documentation:

1. Solution Design including Conceptual Diagram(s)
2. Call Routing Design and Configuration
3. User Manuals, System Manuals, and Administration & Operational Guides
4. Training Manuals

## Support

The selected vendor will be required to provide an annual renewable maintenance and support agreement for the solution. The vendor must provide support during the period on weekdays between 8am and 6pm ET. The vendor will be required to provide a two (2) hour response time for technical issues reported during the above stated support period.

# Functional and Non-Functional Requirements

|  |  |
| --- | --- |
| **Company/Vendor Name:** | Click or tap here to enter text. |
| **Product Name(s) and Version(s):** | Click or tap here to enter text. |

| **Requirement/Feature** | **Product Satisfaction**(please select appropriate one) | **Comments** |
| --- | --- | --- |
|  | **Does Not Meet** | **Partially Meets** | **Fully Meets** | **Exceeds** |  |
| Communications Platform  |  |  |  |  |  |
| * 1. Voice and video call processing capabilities
 |[ ] [ ] [ ] [ ]    |
| * 1. Mobility capabilities (Laptop and Mobile Clients)
 |[ ] [ ] [ ] [ ]    |
| * 1. Provide voice and attendant capabilities that can be centralized across locations and integrate with email calendars
 |[ ] [ ] [ ] [ ]    |
| * 1. Provides built-in conferencing capabilities
 |[ ] [ ] [ ] [ ]    |
| * 1. Supports industry standard protocols
 |[ ] [ ] [ ] [ ]    |
| * 1. Allows connectivity over a wide range of analog, digital, and IP-based devices
 |[ ] [ ] [ ] [ ]    |
| * 1. Provides built-in Contact/Call Centre or capability to connect to different call centers
 |[ ] [ ] [ ] [ ]    |
| * 1. Allows centralized intelligent call routing across the enterprise
 |[ ] [ ] [ ] [ ]    |
| * 1. Provide presence services across a wide range of devices
 |[ ] [ ] [ ] [ ]    |
| * 1. Allow conference bridging for up to 5 parties
 |[ ] [ ] [ ] [ ]    |
| * 1. Provide standard voice mail presentation to email
 |[ ] [ ] [ ] [ ]    |
| Call/Contact Center |  |  |  |  |  |
| 1. Capture resource skillset in routing database
 |[ ] [ ] [ ] [ ]    |
| 1. Provide out-of-the-box historical and real time performance reporting
 |[ ] [ ] [ ] [ ]    |
| 1. Allow agents to view customer call history and past contacts when on a call
 |[ ] [ ] [ ] [ ]    |
| 1. Provide outbound dialing tools for callbacks and targeted campaigns
 |[ ] [ ] [ ] [ ]    |
| 1. Provide built-in wizards to make configuration easy and fast
 |[ ] [ ] [ ] [ ]    |
| 1. Use algorithms and historical data on wait time, call length, and abandoned calls to create a positive customer experience
 |[ ] [ ] [ ] [ ]    |
| 1. Keep agents informed of contact center and individual performance in real time
 |[ ] [ ] [ ] [ ]    |
| 1. Give agents the ability to create and use canned chat messages
 |[ ] [ ] [ ] [ ]    |
| 1. Allow administrators to determine email route by keywords in email content
 |[ ] [ ] [ ] [ ]    |
| 1. Provide tools to help balance effectiveness and efficiency in the call/contact center
 |[ ] [ ] [ ] [ ]    |
| 1. Provide strategic tools for managing the call center - Contact Recording, Quality Monitoring, eLearning, Coaching, Performance Scorecards, Workforce Management, Voice Analytics, Desktop and Process Analytics and Customer Feedback in an integrated solution
 |[ ] [ ] [ ] [ ]    |
| 1. Provide knowledge base screen pops for agents as needed
 |[ ] [ ] [ ] [ ]    |
| 1. Provide tools to manage customer privacy
 |[ ] [ ] [ ] [ ]    |
| 1. Provide multiple channels for interacting with customers; including voice, IM, web chat, SMS text, email, voice mail, fax, scanned documents, and social media
 |[ ] [ ] [ ] [ ]    |
| 1. Provide capabilities for each agent to handle a desired amount of interactions/contacts simultaneously
 |[ ] [ ] [ ] [ ]    |
| 1. Allow integration with business intelligence tools for robust reporting
 |[ ] [ ] [ ] [ ]    |
| 1. Provide a mechanism to easily integrate with other enterprise systems
 |[ ] [ ] [ ] [ ]    |
| Non-Functional Requirements |  |  |  |  |  |
| 1. Provide a high availability cost effective solution design that would ensure service continues when communication links to certain locations are down
 |[ ] [ ] [ ] [ ]    |
| 1. Easily scalable
 |[ ] [ ] [ ] [ ]    |
| 1. Supports a minimum of 800 users and 30 locations
 |[ ] [ ] [ ] [ ]    |
| 1. Active Directory Integration
 |[ ] [ ] [ ] [ ]    |
| 1. Web browser based thin client
 |[ ] [ ] [ ] [ ]    |
| 1. Compatibility with existing handsets deployed in NIB (*list to be provided*)
 |[ ] [ ] [ ] [ ]    |