

June 23, 2014

Deirdre Johnson, Issuing Officer  
Georgia Technology Authority  
47 Trinity Ave, 3<sup>rd</sup> Floor  
Atlanta, GA 30334

Re: Platform28 HCC RFP Response, Technical Proposal Executive Summary

Dear Ms. Johnson,

On behalf of Platform28, I want to thank you for the opportunity to respond to this RFP. For nearly eight years, Platform28 has provided communications solutions, many of which are identical to those requested in the current RFP, to nearly 70,000 state employees and nearly all Georgia state agencies. During that time, Platform28 has distinguished itself with the technical service capabilities of our solutions and exceptional customer service. We hear consistent feedback from Georgia agencies that we are the strongest communications solutions provider with which they work; fortunately this sentiment is echoed across our entire customer base. We enjoy an enormous amount of pride and satisfaction from this reputation and respect the serious responsibility that this places on our staff. We look to address and solve issues immediately, sometimes in the middle of the night or over the weekend, thereby ensuring that our Georgia constituents receive the services they require. We are confident in our understanding of GTA and Georgia state agency culture, fit and requirements. The subsequent technical overview and technical package is intended to demonstrate Platform28's technical capabilities, professional services methodology and pricing flexibility.

Platform28 has significant, relevant and proven experience in providing HCC communications solutions, supporting over 150,000 active daily users on our systems and more than half a billion interactions monthly. Our platform is architected directly for the web to be delivered as cloud contact center solution. This is a very different type of delivery than GTA and Georgia state agencies have experienced with other vendors. We support large-scale implementations very rapidly, leveraging a horizontally scalable infrastructure and a new intuitive interface, both of which significantly improve the implementation process. The entire platform, both for our internal use and to connect to our customers, uses a 100% open REST API and web services, enabling rapid integrations and allowing our customers to quickly implement new tools that improve constituent care. We're confident that all of the solutions outlined in this technical proposal meet or, generally, exceed the requirements of this RFP. Further details of our technical services capabilities are outlined in Attachments 2-B, 2-C, and 2-E

Platform28 follows a disciplined and normalized project management and implementation methodology that ensures that our customer's transition from their legacy platform to Platform28 is successful. Generally, our approach is as follows:

- Introduce a proven methodology for the engagement to ensure stakeholder confidence
- Establish processes that deliver consistent and trustworthy interactions to users
- Help develop a skilled team through hands-on training with contact center tools, business intelligence applications and best practices
- Provide expertise to help evaluate process alternatives and confirm assumptions
- Manage to clearly defined success criteria while building a roadmap to the Constituent Contact Center
- Provide ongoing assistance, audits and recommendations to improve the performance and efficiency, while reducing costs and variability

Specific details of this approach are outlined in this package in Attachments 2-C and 2-E.

We are confident that the pricing and financial terms attached in the Cost Proposal provide GTA and Georgia state agencies significant incentive to move to Platform28 HCC and achieve cost savings. We have outlined pricing options that include line-itemed as well as bundled services to enable agencies to select the model that best delivers cost savings and flexibility. As demonstrated in our response in Attachment 2-E, we've also outlined cost centers and efficiencies Platform28 will drive outside of direct software, services and telco cost reductions.

GTA has made clear in this selection process that there's an impending deadline, hence the need for a quick decision. Concerns have been raised about whether selected vendors can rapidly and effectively migrate agencies off of their legacy systems and onto the selected vendor. We want to make clear that we can absolutely meet this timeline. In our response in section 2-E, we have already created a production HCC site that meets all of the requirements for that Agency laid out in the RFQ. All that's necessary to put that Agency into production is a toll-free number and a file with agent names; it's ready to go. We have experience building a similar production contact center for 250 agents in less than a week. We're confident that our implementation methodology and rapid deployment capacity can replicate this process throughout GTA.

We trust that you will find all the information you have requested in this Technical Proposal. We understand that requirements may, and often do, change as organizations evaluate responses. We are committed to this project and supporting the business needs of GTA and the agencies of the State of Georgia. We are happy to modify our response, as needed based on changing business and technical requirements.

Yours Sincerely,

Mark Ruggles  
CEO, Platform28

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## 1.0 General Description

This Appendix provides an overview of the Contact Center services requirements. The purpose of the document is to provide a perspective of the products, services, equipment, software and support that are included within the scope of the **Exhibit 2 Statement of Work**. It is not intended that the contents be inclusive of all aspects of the environment.

## 2.0 Core Contact Center Services

### 2.1 Hosted Services

The Service provider's solution addresses the requirements in this section with the following:

#### 2.1.1 Solution is available as "Software as a Service" (SaaS)

Platform28 meets this requirement. Platform28 is available as "Software as a Service" (SaaS).

Description: Platform28 deploys, maintains, and monitors its continuously available cloud contact center solutions using a Software as a Service (SaaS), subscription-based delivery and pricing model. Customers are billed for software based on actual usage. Customers can optionally choose to have professional services, toll-free, inbound DID and outbound telecommunications services bundled into 'per seat' pricing.

Delivering software solutions in a SaaS model, rather than the traditional CapEx perpetual licensing model, forces the software provider to prove themselves to their customer every day. If your software doesn't work or you don't provide effective support it's easy for customers to pick up and find a new provider.

For nearly 15 years, Platform28 has proudly delivered SaaS communications solutions to our customers. For the last 8 years we've developed a great reputation delivering SaaS communications solutions to GTA and Georgia state agencies. As Georgia residents, we're proud of that experience and our part in helping provide great constituent services. And while part of the market is trying to transform their legacy contact center solutions to work in the cloud, and transform their companies to the type of services-oriented model that SaaS delivery requires, Platform28 comfortably sits in an enviable position: 150,000 daily users accessing our SaaS communications solutions to manage customer engagement.

Our commitment to GTA and the agencies of Georgia is to deliver SaaS communications solutions with 100% uptime. No questions asked.

#### 2.1.2 Have the ability to scale up/down full contact center services as needed by request.

Platform28 meets this requirement. Platform28 provides the ability to scale up/down full contact center services as needed by request.

Description: Platform28 provides one of the most scalable cloud-based communications solutions available on the market, with more daily users on our systems than virtually any other cloud-based contact center provider.

We've been supporting rapid scaling of the number of agents and significant unplanned increases in call volume for more than 10 years.

Most cloud-based contact center solutions were developed in one of two ways: 1) Using open source Asterisk technology which severely limits the providers ability to quickly scale in a secure, reliable way or, 2) Using traditional premise-based equipment that the provider hosts from a data center but which is not made to scale quickly or support many tenants (Agencies) on their equipment.

Platform28 was written using telco-grade software and hardware to support significant scaling requirements for very large customers, including the largest telecommunications companies in the United States. We use continuously available, geographically distributed, geo-synchronous infrastructure to support contact center services that enables customers to scale up (or down) very quickly to meet significant usage demands. Customers simply add needed resources (organizations, queues, agents, etc.) using the intuitive web-based graphical user interface (GUI) or request additional resources through Platform28 support.

For 8 years, we've been supporting GTA and Georgia state agencies , some of who have had significant, rapid scaling requirements, with functionality very similar to what's outlined in this RFP. Five years ago, we delivered self-service IVR and auto attendant tools for DFCS Child Support hotlines that handled nearly 2 million calls per month.

We're completely confident that the scaling requirements outlined in this RFP can be met with our solutions.

2.1.3 Support multiple contact center partitions and agents with flexibility to interact with other contact centers if possible.

Platform28 meets this requirement. Platform28 supports multiple contact center partitions and agents with flexibility to interact with other contact centers if possible

Description: Platform28 uses a Roles-Based Access Control (RBAC) system that allows partition of multiple contact centers and agents to ensure that agents, supervisors, managers and others have access only to the appropriate resources. Contact centers can easily be set up to share resources and agents can be assigned to work across multiple contact centers.

Platform28 RBAC supports the concept of an organization. The system can support a maximum of 1.6 million top-level organizations. (GTA would be a top-level organization.) Under each top-level organization there can be up to 46,000 sub-organizations. (In the current project agencies would be sub-organizations.) Each sub-organization can have 46,000 sub-organizations of their own, up to 8 levels deep. Security and access controls restrict a user to their own organization and, if rights are assigned to their role, the ability to see any organization below their organization. Agents logging in from their Agent Desktop are given the same security treatments. This process allows for more effective reporting, management and control throughout a service bureau environment.

Platform28 RBAC will uniquely benefit GTA and Georgia state agencies because our multi-tenancy allows users to only have access to the queues, locations, reporting tools and other features that they've been given access to, ensuring greater security and flexibility.

In the case of an emergency or unforeseen event that requires agencies to consolidate resources (like a natural disaster, in which all agencies need to provide emergency constituent services) the Platform28 RBAC will allow users to join consolidated teams, across agencies, to provide needed contact center services.

#### 2.1.4 Provide redundancy for Hosted Contact Center Services

Platform28 meets this requirement. Platform28 provides redundancy for Hosted Contact Center Services.

Description: Platform28's cloud services are offered on a system that has been purpose built to operate in a 'carrier grade', 100% availability mode, while processing the most demanding workloads. Platform28 has further enhanced the system to provide "Continuous Availability" (Always On) service. This is a crucial differentiator, and important for clients who "always" need the service to be up, even in the case of disasters, rather than waiting hours or days to be moved to backup sites.

Platform28 uses a horizontally scalable architecture spread across all components of the system, with multiple geographically diverse data centers to ensure that services are always available. Within each data center there are multiple layers of redundancy to prevent loss of service due to server or software failures. The horizontally scalable architecture means that service nodes can be added or removed while the system is still running, ensuring that Platform28 can scale up, as needed, to easily meet increased client demands.

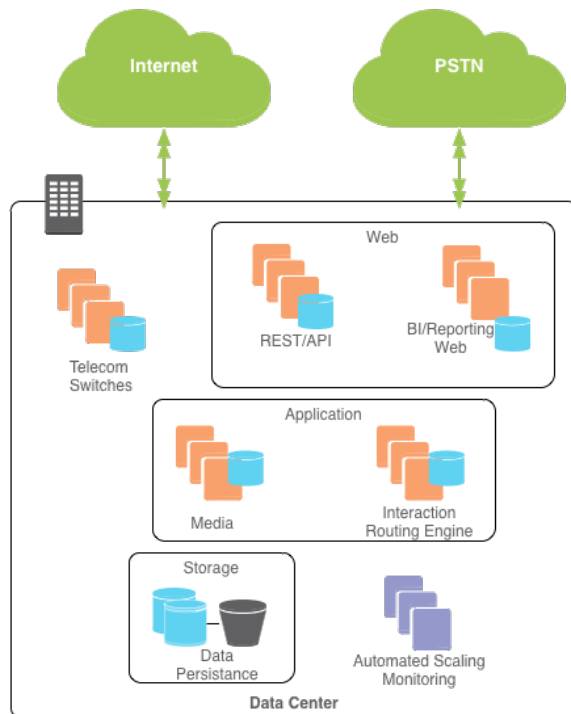
Platform28 maintains multiple redundant PSTN, VoIP and data network connections to provide redundancy at the voice, data and Internet connectivity layers. Client connectivity can also be configured with redundant layers to ensure that dedicated connections, such as point-to-point circuits, or MPLS circuits, are resilient as well.

Platform28 is architected in a manner that, should an event occur that disables an entire data center, the Agent Desktops and Business soft-phones connected to servers at the failed data center will re-register to servers at other data centers, and services will be immediately available again. Incoming PSTN/VoIP connections run in a distributed mode across multiple data centers to ensure that failure of a data center will not prevent incoming calls from being processed.

Platform28 regularly provides network design and testing resources to ensure that customer premises are optimized for redundancy.

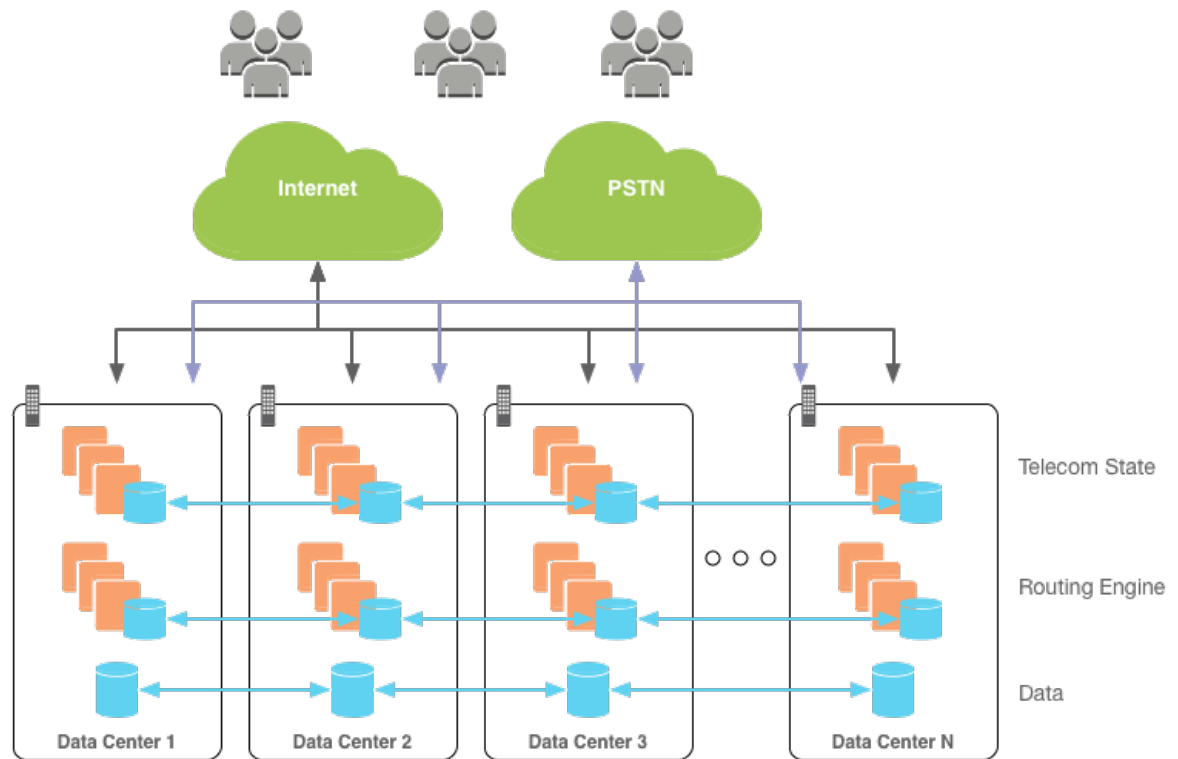
As noted above, this architecture is significantly different than other hosted contact center providers and has distinguished Platform28. The architecture behind Platform28 ensures resiliency throughout our entire network.

Provided below is a diagram of Platform28 resiliency within one of its data centers:





Provided below is a diagram of Platform28 resiliency between data centers:



### 2.1.5 Support TDM and VoIP communications to agents.

Platform28 supports TDM and VoIP communications to agents

#### 2.1.5.1 TDM, ability to route calls to PSTN for call termination on Agency provided systems

Platform28 meets this requirement. Platform28 provides the ability to route calls to PSTN for call termination on Agency provided systems

Description: Platform28 supports call termination on Centrex, PBX's or other equipment that is reached via the PSTN. Platform28 can provide full agent control for hold, transfer, conference, consult, and other enhanced features via DTMF tones.

For nearly 15 years we have provided contact center functionality that routes calls to our customer's existing contact center or PBX solutions, either via TDM or VoIP. Our largest customer deployment with this functionality supports nearly 40,000 agents.

For nearly 8 years we have provided voice services to GTA and Georgia state agencies with termination on Agency provided Centrex and nearly 50 different types of PBX's.

#### 2.1.5.2 VoIP, provide choice of hard or soft phones

Platform28 meets this requirement. Platform28 provides a choice of hard or soft phones.

Description: Agents have several ways to manage VoIP connectivity to agents.

- Agents can leverage Platform28's Agent Desktop with integrated soft phone. An image of Platform28's Agent Desktop is below.
- Agents can also leverage Platform28's PBX soft phone. The PBX soft phone has functionality similar to a desktop phone, with four lines, call hold, call transfer, voicemail, etc. (In addition, the PBX soft phone can be used as a standalone product for business users to replace an existing PBX.)

Both the Platform28 Agent Desktop and PBX soft phone are centrally administered and include local logging of jitter, latency, packet loss, and overall voice performance, providing significantly better management and troubleshooting than 3<sup>rd</sup> party hard or soft phones.

In addition, Platform28 agents can use a range of third party hard and soft phones, as requested. Specific hard and soft phones can be added to the list of supported devices, based on customer request, once the requested device has been tested and deemed compatible.

#### 2.1.5.3 Soft phone should have minimal impact on existing desktop real estate environment.

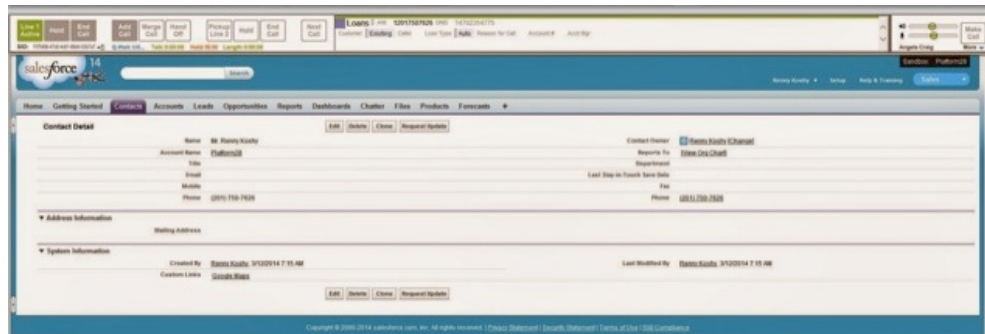
Platform28 meets this requirement. Platform28's softphone has minimal impact on existing desktop real estate environment.

Description: Platform28's Agent Desktop application uses a small, 70 pixel banner at the top of the screen to provide complete telephony control, agent state interaction, call disposition, as well as additional data display.

The Agent Desktop application can be configured to slide away when not needed, reducing the impact on the usable real estate on the agent's screen.

The Agent Desktop can also operate permanently as a minimized application, with telephony controls embedded within a customer's existing application. The Agent Desktop has a built-in REST web service that can communicate locally with applications or sites.

Provided below is an image of the Agent Desktop:



2.1.5.4 Can leverage any standard 10 digit number.

Platform28 meets this requirement. Platform28 can leverage any 10-digit number

Description: This requirement can be interpreted in two ways, both of which we support. Platform28 allows agents to use an assigned 10 digit number for direct inward dialing to specific agents, while allowing agents to be completely unified in queues for call rollover or distribution. As well, Platform28 supports agents on virtually any device (cell phone, landline, PBX, other call center platform) to use their 10-digit number and DTMF tone capability for hold, transfer, conference and other enhanced features.

2.1.6 Provide a hosted contact center solution that is physically located within data centers within the United States.

Platform28 meets this requirement.

Description: Platform28 supports three deployment models, all of which, at the customer's request, can be hosted exclusively from data centers within the continental United States. Those deployment options include: (1) Hosting on Platform28's Public Cloud within geographically distributed data centers in the continental United States. (2) Hosting on a Platform28 Private Cloud using dedicated hardware within geographical distributed data centers in the continental United States. (3) Hosting on a Platform28 Private Cloud within customer's own data centers.

For nearly 8 years Platform28 has been reliably providing solutions to GTA and Georgia state agencies from the same domestic data centers that will host the contact center solutions under consideration in this RFP.

- 2.1.7 Hosted Contact Center supported by staff that is physically located within the United States.

Platform28 meets this requirement.

Description: Platform28's support staff is located in the United States. Platform28's staff is primarily located within the State of Georgia.

- 2.1.8 Provide and support HCC seats in physically located Agency locations and remote teleworker locations.

Platform28 meets this requirement.

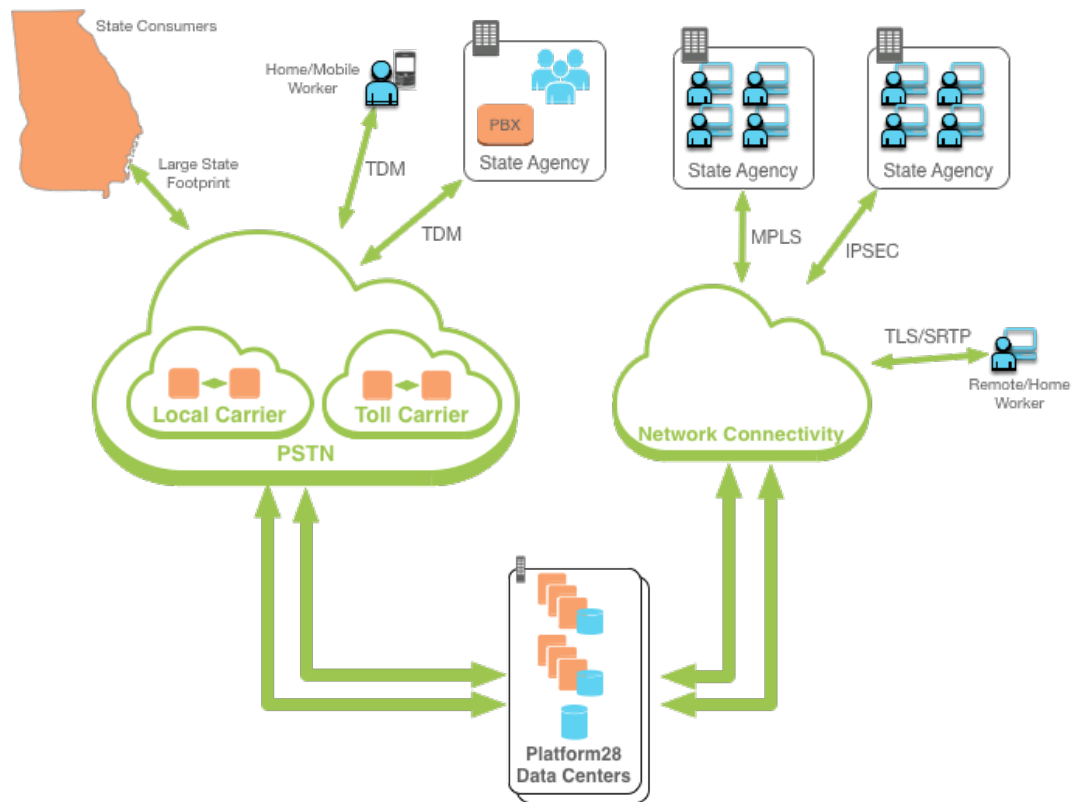
Description: Platform28 supports agents located within brick and mortar offices as well as teleworkers located off premise at a facility/home/etc, teleworkers connected via cellular or other wireless data service, and mobile workers with just a mobile telephone.

One of the strengths of the Platform28 Agent Desktop and Intelligent Routing Engine, is that they support agents using the Platform28 integrated SIP softphone, 3<sup>rd</sup> party VoIP desktop phone, TDM desktop phone or cell phone. In this way Platform28 can flexibly adapt to brick and mortar and remote/home-based work environments, including those where sufficient bandwidth may be difficult to obtain.

For agents within a brick and mortar facility or remote/home-based, both voice and data can be encrypted for great security. Note: Virtually all competitor solutions do not encrypt data to the agent desktop, creating security vulnerabilities, particularly among remote/home-based workers.

An additional strength of the Platform28 HCC, is the Agent Desktop with integrated soft phone. Most competitors rely on 3<sup>rd</sup>-party soft phones. By putting a 3<sup>rd</sup> party product on the agent's computer, they difficult to administer (make configuration changes to), difficult to coordinate tunneling through firewalls, and very difficult to troubleshoot if there's a support issue like poor voice quality. Platform28 developed its own soft phone which is seamlessly integrated into the Agent Desktop. The phone can be centrally administered for the Platform28 administrative interface, making management much easiers. As well, we have included unique quality monitoring and logging tools within the soft phone itself. If a voice quality issue arises logs from the phone itself can be captured and analyzed for things like jitter, latency, and packet loss, enabling faster issue resolution.

A diagram of connectivity options is provided below:



Sufficient bandwidth is required to ensure usable voice quality. Each teleworking agent will use approximately 35Kbps for Platform28 (voice and data), in addition to any requirements of the desktop or web applications they are using for servicing the call. Platform28’s Agent Desktop has been used on 3G/4G connections, when the connection supported only a single user.

- 2.1.9 Administrative functionalities available to the agencies should incur no fees if performed by the Agencies.

Platform28 meets this requirement.

Description: Platform28 does not charge additionally for use of its administrative interface or administrative functions. GTA and Georgia state agencies have full control to change routing, self-service IVR, configuration and other features of the system at no additional charge and without requesting engineers from Platform28 (unless requested). In addition, there is a thorough online help guide for easy answers to questions about administering the system.

This model of allowing users to make complex changes to the system at no cost is substantially different than many traditional providers. Our model reduces expenses and gives much more power and flexibility to our customers.

For nearly 8 years GTA and Georgia state agencies have benefited from this model. And our newest interfaces have been redesigned to be more intuitive while delivering more functionality within the GUI.

That said, over the last 8 years we've also supported many agencies and GTA when a situation develops that agency staff feel unable to address. Whether it's a general support call during business hours or a 2AM call to help configure a new auto attendant because of an unforeseen event, Platform28 has immediately supported agency staff who need help solving problems. At no additional cost.

2.1.10 Provide a call disposition tool that caters to the respective business model of the agency.

Platform28 meets this requirement.

Description: Platform28's call disposition tool is built into the Agent Desktop and controlled via the web portal. Call dispositions are completely configurable on an agency-by-agency basis.

2.1.11 Interface with Agency designee on support of End User systems, desktop support, and standard images.

Description: Platform28 is committed and capable of working with a variety of hardware/software/solution vendors and will provide necessary support, and work with, Agency designated parties to create and deliver effective support for End User, agent desktops, and standard images.

Platform28 uses its Process Guide and Professional Services Methodology to ensure that RFQ response, discovery, documentation, configuration, delivery and production are the most successful technology implementations our customers have experienced.

The Process Guide and Professional Services Methodology follows the proceeding steps:

- RFQ Response and Agency Award to Platform28
- Platform28 sales engineer conducts discovery and creates a detailed Statement of Work (SoW) outlining all project details (organizational mapping and hierarchical outline for setup of roles, Agent Desktop, IVR and queue configuration, reporting customization, integration, platform customization.

- Platform28 sales engineer creates a detailed timeline of all project benchmarks, including project kickoff, roles, responsibilities, dependencies, and production deadlines.
- As needed, Platform28 infrastructure engineers will conduct on-site infrastructure surveys and create a written set of recommendations for the customer.
- Weekly meetings facilitated by a Platform28 project manager are held to ensure that all dependencies for delivery are on track.
- Once the customer's beta site is launched in the cloud (public or private), Platform28 trainers schedule training (on-site or web-based).
- Implementation and trainers may be on-site at customer location at launch.
- Depending on the complexity of the deployment customer will be supporting by the implementation team anywhere from 15-60 days post-launch, at which point they're transitioned to customer support.
- Platform28 implementation and customer support teams schedule a call with the customer to transition customer to the customer support procedures outline in the attached SLA.

Specific details regarding setup, transition, and support are detailed in Section 4 below.

## **2.2 Automatic Call Distribution**

The Service provider's solution addresses the requirements in this section with the following:

- 2.2.1 Support multi-channel routing , basic and advance call routing, skills based routing and call back/virtual queuing.

Platform28 meets this requirement.

Description: Platform28's approach to multi-channel routing is significantly different than our competitors. We've developed our own multi-channel tools that are completely unified within the administrative tools, Agent Desktop, and Business Analytics and Reporting functions. Interaction types can be configured with weights specified by on a queue-by-queue basis (calls occupy 100% of an agent's time, email takes 50%, for example). Interactions in queue are presented at the Agent Desktop in a unified, seamless interface. Dashboards and reports present a completely unified view of all activities within the Agency, location, queue, etc. Most competitors have taken 3<sup>rd</sup>

party tools to that allow them to deliver multi-channel routing but administration, handling of interaction types, and reporting are very difficult.

The Platform28 multi-channel, multi-site/network ACD and intelligent routing system is specifically designed to support large enterprises, service bureaus and telecom carriers requiring multi-tenancy, scalability, and resilient operation. The ACD features the ability to route by queues, skills, teams, and agent preference; any combination of these can be used to create hybrid routing scenarios.

To create further service levels, each incoming interaction is given a priority that can be dynamically raised or lowered to prioritize certain calls over others. Each queue also has a priority to control relative importance of the queues themselves. In addition, agents can be assigned to multiple queues, with a skill level associated with each queue to ensure that the Agent Performance results (based on scorecards/QA) can be directly tied to the call routing algorithm. This skill level support also extends to locations, customers, languages, and generic skills. Taken together, Platform28's hybrid ACD offers a comprehensive agent allocation mechanism that can meet any requirement.

Platform28 provides Virtual Hold features, which can be enabled on a queue by queue basis, that allows the system to "virtually" hold the place of a caller, when queue wait times are high. The system will then call the consumer back, and connect them with an agent, whenever an agent becomes available, or after a specific time set by the consumer. The message that is presented to the consumer, the threshold for queue hold time to enable this features, validation message, etc. are provisioned by the any user with the correct Role/Permission to configure queues.

For any queue, which Virtual Hold is enabled, when the wait time exceeds the configured threshold, consumers are presented with a message that indicates that queue times are long, and whether they would like to use the Virtual Hold feature. The consumer may indicate that they would like to avail this feature, and receive a callback when an agent is available, by using their DTMF keypad. If the consumer prefers a callback after a specific time, the system can also support the entry of an hour and minute for the desire callback time. Once they have completed responding to the system, the system places a "virtual consumer" in the queue, to hold the place of the real consumer, while the real consumer is free to hang up.

Once the virtual consumer is at the "first position" of the queue, and an agent is available, the agent is reserved for the consumer. Then the system automatically dials the consumer, and once the call is answered, will request the party who has answered the phone to locate the initial consumer, or to authenticate their identity. Once the consumer is on the line, the call is immediately connected to the live agent.



2.2.2 Be compatible with IVR, Chat, and Email.

Platform28 meets this requirement.

Description: Platform28 provides a completely unified IVR, ACD, and Email solution. Platform28's Chat solution will be released at the end of Q2, 2014. The platform can also be tightly integrated with 3<sup>rd</sup> party IVR, Chat and Email solutions.

Platform28 provides IVR capabilities to support announcements, data entry, and menu trees, as well as speech recognition. These are completely configurable, including the prompts that are used, the timeouts, valid digits, etc., by any user with the correct Roles/Permissions, via the web portal. The IVR can be tightly integrated with 3<sup>rd</sup> party databases, such as CRM, ERP or ticket tracking tools, enabling customers to call into the IVR, search for and receive updates on their account, as well as providing data that can update the database or be presented to agents.

As described in the response above, Platform28 delivers its own tightly integrated email system. Customers can also use their own email tools with a connector via an email gateway. Any mail system that supports the IMAP protocol to be connected to Platform28 for processing emails. For customers that choose to use their own email system, emails are presented to agents identically to Platform28's own email system. Once an email is received by Platform28, the message may be routed via the ACD and Intelligent Routing systems to the appropriate Agent for processing. Agents are able to respond to email by replying, forwarding, or archiving the message.

Platform28 is in the process of developing an internal chat system to offer a better value to our clients who do not subscribe to third party chat services. (This product will be released by the end of Q2 2014, to enable web-chat, as well as integration with other chat services, including social media such as Facebook and Twitter.) Platform28 can also be integrated with third party chat systems via our REST API. Once chat messages are received, they are processed by the ACD and Intelligent Router to ensure that they are routed to the correct queue and agent, and seamlessly presented to the Agent.

As noted, Platform28's own IVR, Chat and Email solutions can be easily reported on using the Business Intelligence and Reporting tools. Platform28 can also aggregate information from 3<sup>rd</sup> party IVR, Chat and Email systems for unified real-time analysis and reporting in the same tools.

2.2.3 Ability for Agency to manage creation, modification and deletion administration of agents.

Platform28 meets this requirement.

Description: Platform28's highly intuitive web interface allows for easy administration of the system, by Agency staff, including the ability to add, modify or delete agents, queues, teams, skills, languages, etc. The Roles-Based Access Control (RBAC) ensures that only assigned users have rights to manage these functions. For example, RBAC provides the ability for one agency to enable supervisors to add, modify or delete agents, while another agency may only enable administrators to perform this function. Together, the intuitive interface and tight permissioning through RBAC allow traditionally difficult administrative functions to be handled more easily.

Provided below is an image of administrative interface for adding, modifying or deleting an agent:

Anchor Financial Services > Agents > Angela Craig

**Angela Craig** [Edit Name](#)

**Type of Account**

Business User  
 Contact Center Agent

**Email**

Email \*  
  
Used for logging in

Backup Email  
  
Used for alerts or password reset when main email is down

[Change Password](#)

**Dial-by-Name directory**

Include in Dial-by-Name directory?

**Role**

Current Role:

Change Role to:

**Agent Call Routing**

Hold incoming calls for Agent

Hold Time Out

On hold timeout, transfer to:

**Customers** ( 1 Customers )

**Locations**

Filter list of Locations

Atlanta GA	Austin TX
Chattanooga TN	Chicago IL
Columbia SC	Dallas TX
Denver CO	Fort Lauderdale FL
Macon GA	Montgomery AL

+ Assign to Location

**Teams** ( 2 Teams )

**Queues** ( 8 Queues )

**Proficiencies** ( 4 Proficiencies )

**Status**

Active  
 Block all calls and web access

**Platform28 Desktops**

Not available

**Phones**

Description	Model	MAC/SIP Username	Registration
ACraig 1	IP 550	17:35:42:1F:35:10	Not Registered
<input type="text"/>	Select a Phone Model		

**Fax Line**

Turn on fax line?

**Voice Line**

Turn on voice line?

**Phone Numbers**  
**12817714905**

Extension \*

Exclude from Agent Terminal's Extension Directory?

Outgoing Caller ID

**Voice Mail**

Turn on voice mail?

Maximum Number of messages

Messages Expire After  
 days

Mailbox PIN

Used to check messages from a phone

Use custom "leave a message" greeting? [Upload](#)

Use custom "busy" greeting? [Upload](#)

Use custom "do not disturb" greeting? [Upload](#)

Use custom "mailbox is full" greeting? [Upload](#)

**When this Line is Called:**

- Simultaneously ring the following:
  - All of Angela's Platform28 Phones for 20 seconds
- Then, if no answer, simultaneously ring the following:
  - Angela's Mobile 12817743565 for 20 seconds
- Then, if no answer, transfer to:
  - A Queue
  - Customer Support

[Apply Changes](#) [Discard Changes](#) [Delete](#)

One of the challenges with competitor systems is that they are either very limited functionality in their administrative interface, requiring Agency IT administrators or the vendor itself to make changes to Agents, or the user interface is so convoluted that it takes certifications with the vendor to learn how to make even basic changes.

That's not the case with Platform28. Throughout 2012 and 2013 Platform28 engineers worked closely with a usability expert to redesign all of the platform's interfaces to

ensure that complex tasks were made easy. The result is a solution that takes minimal training, has integrated online help guides on every page, and puts the power to rapidly adjust how a center operates in the power of supervisors and managers rather than engineers.

2.2.4 Provide Agency with the ability to adjust wrap time and force calls to agents.

Platform28 meets this requirement.

Description: Platform28 provides completely configurable wrap-up timers, per Queue. Based on the type or priority of calls presented to agents, customized wrap times will force an agent out of wrap up time and onto their next call, on a queue-by-queue basis. In addition, each queue can be configured to force “auto-answer” (calls are delivered to agent, along with a short message or tone at the beginning of the call), or “manual-answer” (agent must answer incoming call by clicking a button).

2.2.5 Ability to build not ready codes, also the ability to automatically interrupt not-ready codes as call volumes increase excluding break codes.

Platform28 meets this requirement.

Platform28 provides canned and customizable not ready codes (break, bathroom, lunch, training, etc). The system can be set up to automatically block break codes available to agents during periods of high call volume.

2.2.6 Email routing for multiple skill sets.

Platform28 meets this requirement.

Description: Platform28 supports complete skills based routing of email with the identical features and capabilities described above for skills based call routing.

Platform28’s powerful Intelligent Routing Engine allows all media types, including email, to be configured with multiple skill sets and routing rules to handle / resolve business issues. This simplifies management (unified interface), consolidates reporting, and also ensures that routing can accomplish the business rules and business outcomes Agencies need to address, rather than forcing Agencies to change their business rules to accommodate the new HCC.

2.2.7 Agent whisper feature.

Platform28 meets this requirement.

Description: As part of Platform28's quality management tools, the solution features complete agent monitoring, including whisper, silent monitoring and barge-in capabilities.

2.2.8 Interact with Agency regarding the configuration and scripting of Automatic Call Distribution (ACD), Intelligent Routing, and Predictive Dialing.

Platform28 meets this requirement.

Description: As noted in 2.1.11 above, Platform28 works closely with our customers to ensure that configuration, testing and deployment meets completely satisfies customer expectations. Platform28 engineers will interact with Agency regarding the configuration and scripting of all features of Platform28's cloud deployment, including, but not limited to ACD, Intelligent Routing, and Predictive Dialing. Platform28 will also schedule an optimization review 15-60 days post-launch, and every quarter thereafter, to ensure collaboration has resulted in efficiency use of the system in production.

For more detail on Platform28's on configuration and implementation please see section 4.1 below.

Platform28 has worked closely with GTA and Georgia state agencies over the last 8 years to ensure that the unified messaging, IVR and auto attendant solution complies with the ever-changing needs of effective constituent support. (These tools leverage the same Intelligent Routing Engine specified here.) We have delivered on-site and web-based training (approx. 100 sessions at launch) and worked closely with Agencies to help configure and deploy intelligent routing rules. Many of these deployments were very complex, with local numbers throughout Georgia forwarding calls to centralized and branch offices throughout the State.

We have a clear understanding of the needs, culture, business needs and use cases of GTA and State Agencies and are completely confident in our ability to deploy ACD, Intelligent Routing, and outbound features.

2.2.9 Ability to have agents from multiple agencies in a shared skillset.

Platform28 meets this requirement.

Description: Platform28 has been built from ground-up with true multi-tenancy and data separation capabilities. (Please see complete description of Platform28 multi-tenancy and Roles Based Access Control, RBAC, above.)

Platform28 can be configured to allow multiple agencies to work in a shared skillset. This can be done in one of multiple ways, including setting up shared permissions, shared skills, shared queues, shared sub-organization, and primary with rollover queues. This configuration is done directly within Platform28's administrative interface and can be done without the need for engineers within an Agency or Platform28. And all of this configuration can be done in advance so should an event occur, like a natural disaster or policy decision that increases volume (i.e. the recent home heating assistance that created a significant spike in inbound calls), with just a few clicks in the interface calls will overflow to agents at additional agencies.

#### 2.2.10 Ability to route calls to different agency groups.

Platform28 meets this requirement.

Description: Platform28 queues can be configured to route calls to specific agents, skills, teams, locations, and other logical segmentations, as well as routing by variables appended within an IVR or data attached via web services. If the primary target is unavailable multiple rollover options can take affect based on routing rules, including routing to additional groups, other agencies, 3<sup>rd</sup> parties, etc.

#### 2.2.11 Force calls to agents when staffed in without them having to signal to receive a call.

Platform28 meets this requirement.

Description: Each queue can be configured, via the web portal, to force "auto-answer" (calls are delivered to agent, along with a short message or tone at the beginning of the call), or "manual-answer" (agent must answer incoming call by clicking a button). In an "auto-answer" mode, the agent does not have to signal to receive a call.

#### 2.2.12 Provide the ability to change gate – opening or closing

Platform28 meets this requirement.

Description: Platform28 allows schedule-based call routing using our Intelligent Router. Schedules are extremely flexible, and easily managed via the web-interface, and can be setup in advance, reducing the need for just-in-time management.

GTA and Georgia state agencies may use schedules to configure simple opening/closing times independently for weekdays and weekends, or setup more complicated schedules with holidays configured by a combination of day, date, month, year, day-of-week, week-of-month, and week-of-year.

2.2.13 Provide an alert when an agent is dropped from an ACD queue.

Platform28 meets this requirement.

Description: Platform28 has the ability to alert on a dropped agent condition. Agents are dropped from a queue if they are not answering calls delivered to them, or if they fail to respond to system initiated queries.

2.2.14 Ability to set thresholds on agent, application, and skillset levels.

Platform28 meets this requirement.

Description: Platform28 allows schedule based call routing using our Intelligent Router. Schedules are extremely flexible, and easily managed via the web-interface, and can be setup in advance, reducing the need for just-in-time management.

GTA and Georgia state agencies may use schedules to configure simple opening/closing times independently for weekdays and weekends, or setup more complicated schedules with holidays configured by a combination of day, date, month, year, day-of-week, week-of-month, and week-of-year.

2.2.15 Ability for supervisor to log agents out of the system.

Platform28 meets this requirement.

Description: Platform28 provides the ability for supervisors (Team Leads) or managers to log agents out of the system via the web portal.

2.2.16 Ability to integrate with Customer Relationship Manager (CRM).

Platform28 meets this requirement.

Description: Platform28 provides a complete REST API for integration, along with the ability to consume web-services. This allows for virtually unlimited options for integration. Screen pops are done via URL's with data-substitution built-in, and allows most CRM systems to be used almost immediately with minimal effort.

Platform28's methodology for enabling CRM integration is very different than our competitors and has recently allowed us to gain significant momentum in the market. Most competitor systems are limited in way CRM integration works. Most systems are based on proprietary tools or limited, open source platforms, requiring significant professional services and extended timelines to perform the integration. As well, once the integration is completed the types of data that can be shared between the HCC and

the CRM is limited, enabling only a simple screen pop of the CRM and still necessitating separate reporting from the HCC and CRM.

Platform28's open REST API will allow for rapid onboarding of agencies, much tighter integration, and unified reporting directly from the CRM or Platform28's Business Intelligence and reporting tools. (See below for screenshots and description of these tools.)

Platform28 supports simple integrations using our configurable screen-pop mechanism, which allows any call-level meta data to be pushed to the CRM during the screen pop. This mechanism is sufficient for many organizations to provide an integrated CRM view for agents.

In addition to the 100% open REST API, Platform28 uses programmable web-services to allow bi-directional interaction of Platform28 and the CRM. Platform28's unique API allows the CRM programmer or administrator to access and control all aspects of Platform28's operation (in real-time) via the REST API. This includes the creation, modification, and deletion of users, queues, locations, customers, teams, roles, etc. Platform28 also supports both real-time and batched data push to the CRM.

The Platform28 Agent Desktop has a built-in REST web server, allowing for AJAX interaction between any web application and the desktop, for telephony and data control or query. In addition, this REST server can be contacted by any locally installed application, allowing simple 'bridges' to be built to support COM/OLE and other operating system specific integration mechanism.

### **2.3 Auto-Attendant and Integrated Voice Response**

The Service provider's solution addresses the requirements in this section with the following:

#### **2.3.1 Provide automatic speech recognition (ASR) and Text-to-Speech (TTS)**

Platform28 meets this requirement.

Description: Platform28 support basic word recognition for numbers, yes/no, etc. using a basic ASR system. Platform28 offers a more comprehensive 'advanced' ASR for clients who require more complex grammars, or for those who require larger vocabularies, higher recognition rates, etc. The Advanced ASR is an option, and is priced separately from the basic per-seat pricing.

Platform28 offers a TTS option that can be used in the flow wherever a normal prompt



is expected. The TTS is an option, and is priced separately from the basic per-seat pricing.

GTA and Georgia state agencies have been using Platform28 TTS for nearly 8 years. The administrative interface allows even non-technical users to simply enter a word or phrase to be spoken in the IVR and be immediately deployed. The system reads those words or phrases and constituents can use their keypads to respond.

These tools have been used by GTA and Georgia state agencies to quickly deploy custom IVR's and auto attendants during events such as natural disasters.

### 2.3.2 Include call back/virtual queuing capability.

Platform28 meets this requirement.

Description: Platform28 provides a virtual hold capability that provides callback/virtual queuing. A complete description is provided above. See 2.2.1.

### 2.3.3 Ability to integrate with Customer Relationship Manager (CRM).

Platform28 meets this requirement.

Description: Platform28 provides a complete REST API for integration, along with the ability to consume web-services. This allows for virtually unlimited options for integration. Screen pops are done via URL's with data-substitution built-in, and allows most CRM systems to be used almost immediately with minimal effort.

Please see section 2.2 above for a complete description of Platform28's seamless CRM integration tools.

### 2.3.4 Ability to integrate to agency applications and database systems.

Platform28 meets this requirement.

Description: The same tools that allow for seamless and rapid CRM integration (described above), including a 100% open REST API for integration, along with the ability to consume web-services, allow for the integration with agency applications and database systems. We have conducted integration with many, many applications, database systems, sites, and tools. Using our API and REST service, integration with almost any application or database is possible.

In addition to the tools available to support such integration, Platform28 has a group of engineers experienced with managing these types of integrations for our customers.

During a recent deployment, Platform28 was tasked with integrating with our customer's IBM identity management system and their home grown electronic medical records system. The customer wanted to be able to collect consumer information in the IVR, pass it to their database, and then present a custom list of options and routing rules based on the profile of the consumer. In addition, they wanted a custom screen pop that displayed in the Platform28 Agent Desktop data captured in the IVR as well as data from their database. We used both our REST API and web services to quickly create a deep integration with two-way data communication, as well as unified reporting.

- 2.3.5 Setup, support, operate, and maintain the IVR systems and related call routing / mapping logic. This includes caller menu selection, all voice messaging scripts and prompts, and intelligent call routing to call queues / Agents based on type of characteristics of inbound call. Make changes to the IVR on a regular bases as required or requested by Agency.

Platform28 meets this requirement.

Description: Platform28 shall setup, support, operate, and maintain the IVR systems and related call routing and mapping logic. This includes caller menu selections, all voice message scripts and prompts, and configuration of the ACD and Intelligent Routing based on type or characteristics of inbound call. Platform28 shall also make changes to the IVR system on a regular basis as required or as requested by Agency.

In addition, all of this functionality is exposed in Platform28's recently redesigned, intuitive interface so if an agency would like to make changes themselves instead of relying on Platform28, it can. If given permission by an administrator, technical and non-technical users can easily go into the system and make all of the changes specified here, including changing traditionally complex call routing and mapping logic.

Platform28 has worked with GTA and nearly every state agency over the last 8 years to provide identical types of support. That support has distinguished us a close partner to agencies. We're repeatedly told that we're the ones that they can call to accomplish complex tasks in a few minutes that agencies have waited days and weeks to get. In addition, we're the partner agencies can call at 2AM to make quick changes, if the need arises. (And it has.)

- 2.3.6 Create and record message scripts for call queuing and for information prompts as requested by Customers, including IVR applications that interface with host systems in designated sites.

Platform28 meets this requirement.

Description: Platform28 shall create and record message scripts for call queuing and for information prompts as requested by Customers, including IVR applications that interface with host systems in designated sites.

As described above, Platform28 has provided this service for GTA and nearly every state agency for nearly 8 years.

In addition, as detailed in our reponse to TTS above, if GTA or Georgia agencies require rapid changes to recorded messages they can record the message themselves and upload it directly into the GUI or type a message or phrase that will be read out to constituents via TTS. Recordings and TTS phrases are deployed immediately upon saving, so there's no delay waiting for changes to go into effect.

- 2.3.7 Establish and follow Customer approval process for changes to IVR scripts, hold messages, music on hold, predicted wait times, queue messages, schedules and after hours for emergency messages.

Platform28 meets this requirement.

Description: Platform28 uses a disciplined scoping, design and approval process, as well as documented change management policy. If customers specify a written change management policy, changes take place via change management documents that are signed and submitted to Platform28. (Details of Platform28 professional services methodology, procedure and dependencies are provided in section 4 below.) c

For this engagement, Platform28 will follow the written change management and Customer approval process for changes to IVR scripts, hold messages, music on hold, predicted wait times, queue messages, schedules and after hours or emergency messages.

- 2.3.8 Provide the ability to make emergency short notice changes to the IVR systems to address business problems, service issues, outages, or other items that may impact contact volumes.

Platform28 meets this requirement.

Description: Platform28 shall provide the ability to make emergency (short notice) changes to the IVR systems to address business problems, service issues, outages, or other items that may impact contact volumes.

As noted above, the Platform28 IVR and auto attendant systems enable users to make rapid changes to the IVR via uploading new messages or through TTS. GTA and Georgia state agencies have been using these tools to great effect for 8 years to make

emergency (short notice) changes. In addition, users can easily make changes in the GUI to add agents to queues, provide new primary and rollover queues, and combine agencies as available resources to handle issues, outages, or other events that may increase call volume.

2.3.9 Provide 24x7 automated (IVR) support in certain situations, including retrieval/recall

Platform28 meets this requirement.

Description: Platform28 provides a comprehensive IVR solution with announcement, data entry, and menu tree capabilities. In addition, Platform28 has a built in auto-attendant functionality to support inbound call routing and transfer based on name directory lookup. The IVR may further be integrated with other systems using data entry feature in conjunction with the web-service integration.

A complete description of Platform28's self-service IVR solution and methodology for integrating this solution with 3<sup>rd</sup> party systems is provided above.

2.3.10 Allow each state agency the ability if needed to update their own recorded messages, routing messages, etc. without needing to contact their provider.

Platform28 meets this requirement.

Description: See above. Platform28 is completely manageable through a web portal. Any person who is granted the appropriate Role/Permission can login via the web-portal, and make the desired changes without contacting Platform28. Due to the separation of organization (multi-tenancy), each state agency can be setup with local administrators who have access to a limited sub-set of administrative features (such as changing prompt recordings, schedules, etc.).

2.3.11 Have redundancy capability to an alternate system during a storm/disaster event. This would include alternative messaging, remote phone capabilities.

Platform28 meets this requirement.

Description: Platform28 shall support redundancy capability to an alternate system during a storm/disaster event. This would include alternative messaging, remote phone capability, etc.

As described above, Platform28 RBAC allows calls to immediately be re-routed to an alternate agency, location, queue, team, or agent during a storm/disaster event. These routing changes can be preconfigured so they simply require pointing a phone number

to a different queue with a couple of button clicks. These changes can be made directly by GTA or Georgia state agencies themselves or by Platform28.

Messaging changes can be made via uploading new messages directly into the GUI or by entering TTS words or phrases, which are deployed immediately upon hitting the Save button.

All of Platform28's data centers are connected using 100% uptime webscaled infrastructure that ensures that HCC functionality remains active during storms/disaster events. See above description and topology documents for more complete details.

## **2.4 Reporting & Analytics**

The Service provider's solution addresses the requirements in this section with the following:

- 2.4.1 Provide industry standard reporting for system, agents, ACD and IVR, including real-time, industry standard call metrics and the ability to set SLA's therein.

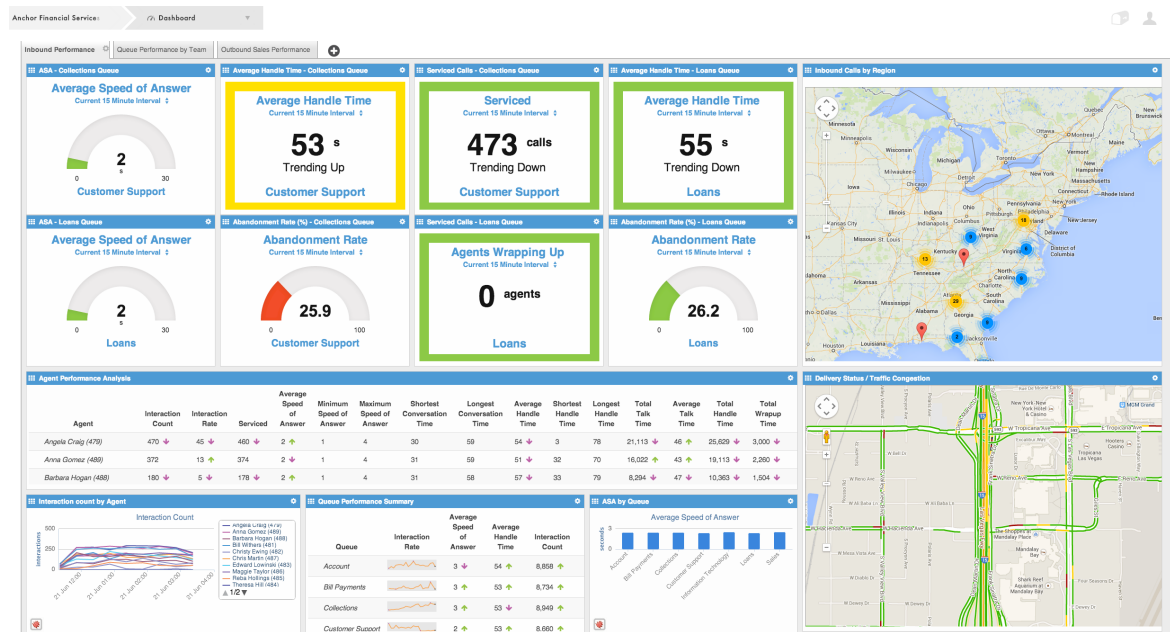
Platform28 meets this requirement.

Description: Platform28 reporting includes real-time analysis and historical reporting. Real-time analysis uses Platform28's fully integrated self-service Business Intelligence application. The solution features highly customizable dashboards that allow users to easily build panels that display a view of business operations relevant to their positions. The Business Intelligence application allows organizations to aggregate contact center platform and 3rd party applications (CRM, sites, ticket tracking) data to create a unified, holistic view of customer management. The application also allows users to set customizable thresholds and SLAs to monitor all activities on the platform. If a threshold is breached the system can display information within the dashboard and send users a notification email.

Among the powerful features of the Business Intelligence application is that it's tied to the roles-based access within the system. All users of the system have access to the dashboards but they're only given access to the data they have permission to see. For example, a supervisor will only get data on the agents, queues, and work products they manage, but a site supervisor will be able to report on all of the activities within their site.

As well, users can set up multiple tabbed dashboards, displaying the most relevant aggregate or granular data, or line of business, in a discreet view.

Provided below is an image of Platform28's contextual Business Intelligence solution for real-time analysis:



2.4.2 Ability to provide base line, canned, ad-hoc, historical and real-time reports supported by dashboards with graphs and charts.

Platform28 meets this requirement.

Description: Platform28 can support base line, canned, ad-hoc, historical and real-time reports supported by dashboards with graphs and charts with our BI and Reporting tools.

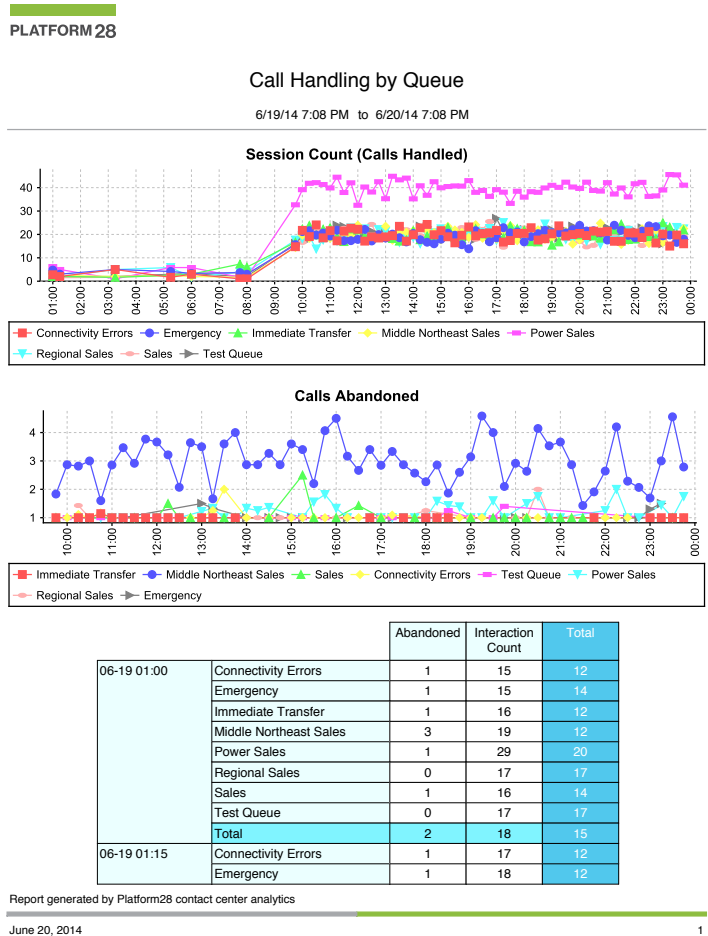
Historical reporting tools are, again, based on role. Users have access to run reports on data covering the areas of the agency they have been given permission to access.

Historical reporting has four general areas of functionality:

- Reporting Categories- General categories from which detailed reports can be accessed, including Agents, Queues, IVRs, and Campaigns
- Reports Within a Category- For example, within Queues, users can access Queue Efficiency Reports, Queue Volume Reports, Queue Service Level Reports, etc
- Custom Reports- Any user can access a standard report or a report shared with them, and customize it to create a unique view for historical analysis. Users can share custom reports with others within the organization

- Reports Shared with You- Users can have custom reports shared with them by supervisors, administrators, executives and others within an organization

A sample Queue report with graphs and charts is provided below:



In addition, Platform28 engineers regularly build reports to match those required by our customers to gain more effective visibility into HCC activities. Often, when a new customer is transitioning to Platform28, our engineers will match the customer’s existing reports to ensure they continue to get consistent access to the metrics they need while transitioning HCC platforms.

Details of Platform28’s industry-leading Business Intelligence tools are provided above.

- 2.4.3 Ability to support wallboard displays for dashboard performance metrics such as calls/emails/chat/etc. answered, service levels, abandon rates, calls waiting, hold times, view all agents status, and banner messages.

Platform28 meets this requirement.

Description: Platform28 can support wallboard displays for dashboard performance metrics such as calls/email/chat/etc. answered, service levels, abandon rates, calls waiting, hold times, view all agents status, and banner messages using our business intelligence tool.

- 2.4.4 Ability for the Agency to define, build and run custom reports supporting business requirements.

Platform28 meets this requirement.

Description: Platform28 shall provide Agency with required tools and documentation to build custom reports. Those reports will then be available in the web portal for individual users. Users can then modify reports, save them as docked reports, and share them with individuals, groups or roles.

As described above, Platform28 has several ways that enable the construction of custom reports, either via the GUI or backend reporting management.

- 2.4.5 Provide for real-time access by Authorized User to reporting systems

Platform28 meets this requirement.

Description: Platform28 allows anyone with the appropriate Role/Permission to access the reporting system.

Please see description of the Platform28 RBAC and real-time dashboards above.

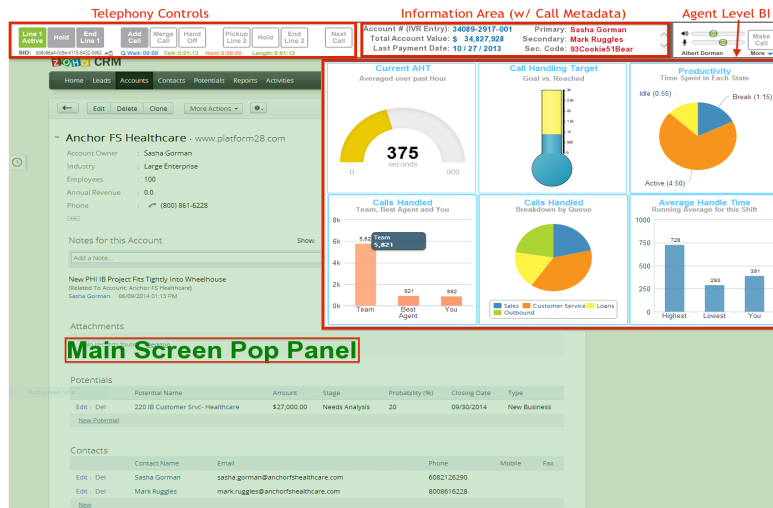
- 2.4.6 Allow agent to view their individual call metrics (real time, historical and baseline) on their desktop.

Platform28 meets this requirement.

Description: Platform28 Agents are allowed to view individual call metrics on the Agent Desktop. This includes the number of calls they have processed in the current login session or current day, their average handle time and talk time, or other metrics as it pertains to the agent, their queue, peer group, site, or other logical groupings.



An image of some of the metrics available for display directly on the Agent Desktop during a CRM screen pop is below:



2.4.7 Ability to change reporting metric requirements for different skillsets

Platform28 meets this requirement.

Description: Platform28’s BI and reporting systems are fully configurable, including by skill, as specified in this feature requirement. In most cases, thresholds, SLAs and other metrics for reporting are configured by client administrators to suit the needs of their organization. Access to this configuration is controlled by the RBAC system, and anyone with the right Role/Permission may setup or make changes to metrics thresholds, or reporting parameters used for reporting on metrics. In addition, Platform28 or Agency IT resources can change the reporting metrics for different skillsets and make them available for specific users.

2.4.8 Ability to prompt messages on agent desktop displays

Platform28 meets this requirement.

Description: Platform28’s web portal allows supervisors and managers to send an announcement to a team, or to individual agents. These messages are displayed on the Agent Desktop.

- 2.4.9 Ability to provide an Agent Report that tracks the entire Agent call flow for any single call.

Platform28 meets this requirement.

Description: Platform28's call flow tracks all steps taken by the agent during a call. This information is stored into a database and may be pulled via a report for specific calls or specific agents.

- 2.4.10 Ability to export raw contact center analytics data for use.

Platform28 meets this requirement.

Description: Platform28 allows raw export of all data. Automated data exports can be configured to run on a schedule or data can be exported in near real-time via the Platform28 REST API or web services.

- 2.4.11 Provide access to application historical data for 37 months, agent historical data for 13 months.

Platform28 meets this requirement.

Description: Platform28 shall store data for Agency for 37 months, and agent historical data for 13 months. The scope of data meeting "application historical", vs "agent historical" shall be defined during the initial assessment phase.

## **2.5 Call Recording & Basic Quality Management**

The Service provider's solution addresses the requirements in this section with the following:

### 2.5.1 Call Recording

- 2.5.1.1 Provide 20% random call recordings and screen capture per agent per day.

Platform28 meets this requirement.

Description: Platform28's quality management solution provides several methods to meet the requirement for 20% random call recording. It is our recommendation that GTA and Georgia state agencies use Platform28's "post call" rule to **keep** 20% of call recordings, while recording 100% of calls in real-time. This allows better functionality for the requirements noted in section 2.5.1 sub-item 1, sub-item 1.10. If using this model, when an agent signals a call recording to be 'kept' the entire conversation shall

be kept from the beginning of the call, rather than only from the point where the agent requests the recording.

Screen capture capability will go into General Release in Q3 2014. ***The release this may be pulled in, if required, to meet any required deployment timelines for GTA.*** 100% screen capture and sampled screen capture rules are set identically to Platform28's existing call recording rules engine.

- 2.5.1.2 Provide online storage to hold at the minimum two calendar months of recordings per agent.

Platform28 meets this requirement.

Description: Platform28 shall provide storage for at least two calendar months of call recordings per agent, at the rate of 20% of all calls received by the agent (specified in 2.5.1, sub-item 1.1).

Platform28 allows for storage of recordings in several ways, including delivering recordings to customers post-call or in batch form periodically, or by retaining customer's call recordings within the Platform28 archive.

- 2.5.1.3 Provide interface to achieve recordings to GTA or Agency provide storage.

Platform28 meets this requirement.

Description: Platform28 shall provide an interface or means to move recordings to GTA or Agency provided storage immediately after the end of the call, or during archiving out of Platform28 provided storage.

Platform28's quality management solution provides an interface to view all recordings and query recordings based on multiple criteria, including date, agent, queue, ANI, DNIS, and other criteria. Access to recordings is limited by role and permissions controlled by Platform28's RBAC.

- 2.5.1.4 Provide a method for appropriately adjusting monthly online storage needs.

Platform28 meets this requirement.

Description: Platform28 shall allow GTA or Agencies to adjust monthly online storage needs. This will simply requires GTA or Agencies to contact Platform28 support and indicate archiving requirements.

Platform28 storage and archive space dynamically scales with the storage requirements of our customers. Customers are invoiced only for the storage capacity they use, significantly reducing overall costs for building and maintaining large archives.

2.5.1.5 Ability to barge-in a call, coach, conference or take over call and record it.

Platform28 meets this requirement.

Description: Standard in supervisor features is the ability to monitor, coach, barge-in, take over a call and initiate recording. These features are only available to users that have been provided permission to monitor, coach or barge.

2.5.1.6 Ability to listen to a call at any point during the call.

Platform28 meets this requirement.

Description: Supervisors have the ability to begin monitoring calls, as described in 2.5.1.4, at any point in the call.

2.5.1.7 Ability to record one agent during workday and not impact the 20% recording time.

Platform28 meets this requirement.

Description: Platform28 shall provide the ability for spot recording/recording of one agent during workday to not impact the 20% recording time.

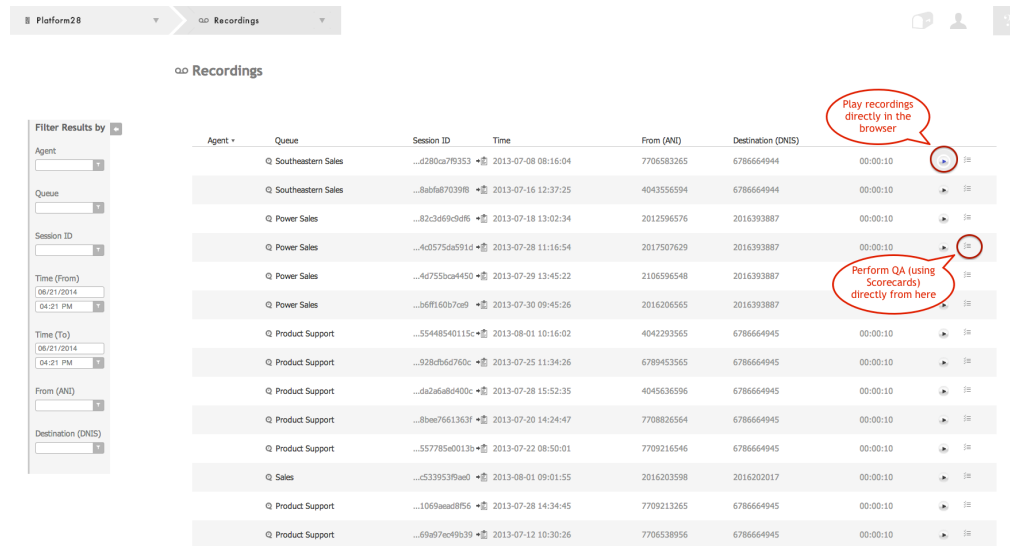
Agents and supervisors can select to record individual calls one at a time. This spot-recording functionality does not impact the sampled (percentage) recording rules.

2.5.1.8 Ability to listen to recorded calls from any location (web based call recording).

Platform28 meets this requirement.

Description: Platform28 provides access to recording playback via the web portal (accessible to anyone with an Internet connection) to anyone with the appropriate Role/Permission.

Provided below is an image of the interface to retrieve and listen to call recordings:



### 2.5.1.9 Ability to email downloaded recordings.

Platform28 meets this requirement.

Description: Platform28 stores recordings in MP3 or WAV format and both formats can be emailed after being downloaded.

Platform28 can also set up automatic rules to distribute call recordings via FTP or other delivery methods based on business rules.

### 2.5.1.10 Ability for agent to initiate recordings their own call

Platform28 meets this requirement.

Description: As described, agents can initiate call recording via buttons on the Agent Desktop. Agents can also initiate call recording via buttons embedded in an integrated CRM or via DTMF if they're using a 3<sup>rd</sup> party device.

### 2.5.1.11 Ability to search recordings by filters

Platform28 meets this requirement.

Description: Platform28 provides access to anyone with the correct Role/Permission to access the recordings via our web portal. Standard search parameters are provided to locate call recordings by ANI, DNIS, queue, agent, time/date, call duration, etc.

Please see the description and screenshot above to see how call recordings can be queried.

- 2.5.1.12 Have the ability to administer call center recordings based on an agent. Be able to designate 100% recordings or unique amount separate from standard recording environment, per agent.

Platform28 meets this requirement.

Description: Platform28 shall provide Agency with the ability to administer call center recordings based on agent or queue. This will include the ability to designate 100% recordings or a unique percentage per agent or queue, separate from the standard recording environment.

As described, Platform28 can set multiple recording logic based on business rules, such as oversampling of trainees, high value queues, or other requirements. Platform28 can be set up to record an entire center at 100%, specific queues at 20%, and apply ad hoc recording to specific agents. All recordings can be made available in the same interface post-call.

## 2.5.2 Customer Surveys

- 2.5.2.1 Provide the ability to initiate, collect and track information on customer surveys within the system for the support of the contact center service.

Platform28 meets this requirement.

Description: Platform28 shall provide Agency with the ability to initiate, collect, and track information on customer surveys within the system for the support of the contact center service. Platform28 allows customers to implement customer surveys and retain data longitudinally for ongoing support of services.

## 2.6 Network & Transport

The Service provider's solution addresses the requirements in this section with the following:

## 2.6.1 Toll-Free service requirements

### 2.6.1.1 Provide per-minute inbound and outbound toll-free services

Platform28 meets these requirements.

Description: As noted in section 6.1 below, Platform28 has provided toll-free services pricing separately as a line item based on actual usage and can bundle those charges into ongoing per seat charges, by request.

### 2.6.1.2 Provide inclusive inbound and outbound toll-free services

Platform28 meets these requirements.

Description: As noted in section 6.1 below, Platform28 can provide toll-free services pricing separately as a line item based on actual usage and bundled in per seat charges.

## 2.6.2 Trunking Requirements

### 2.6.2.1 Provide Erlang standard calculations for appropriately sizing inbound trunking requirements and provide quarterly assessments to adjust as needed.

Platform28 meets this requirement.

Description: As noted below, Platform28 supports 150,000 active daily users and nearly 600,000,000 interactions monthly. The Platform28 network includes massively scaled TDM and VoIP trunks that are over-provisioned capacity ranging from 2x to 10X with each of its redundant telco providers. In addition, Platform28 only selects telco providers that have a minimum of two active, redundant switches, ensuring continuity within and between all providers in Platform28's network.

The methodology for the design of Platform28 network of data centers and telco trunking ensures that no inbound calls are blocked or receive a busy signal, regardless of significant peaks in call volume that may occur.

Platform28 regularly works with customers, and will work with GTA and the Agency customers, as needed, to provide a comprehensive analysis of inbound trunks, data connectivity, local PSTN services, and other telecom and data services. The analysis uses best-in-class practices for sizing circuits, including the use of Erlang (traditional, or modified) analysis, where appropriate. This analysis results in suggested configuration and sizing of inbound and outbound trunks, data connectivity, local PSTN services and

other telecom and data services. Furthermore, Platform28 will continually provide analysis updates, as appropriate to ensure that GTA and Agency Customers will have adequate telecom trunks, data pipes and services to meet their capacity requirements. This analysis update will be done at least once per quarter, or at any point when there is a significant change in call patterns, staffing or other factor that may affect capacity.

GTA and Agency Customers may access Platform28's extensive BI interfaces to have visibility into trunk utilization at any point in time. More details are provided below in 2.6.3.2.

2.6.2.2 Trunking can be shared between Agencies but should not impact performance of individual contact centers.

Platform28 meets this requirement.

Description: As noted below, Platform28 supports 150,000 active daily users and nearly 600,000,000 interactions monthly. The Platform28 network includes massively scaled TDM and VoIP trunks that are over-provisioned capacity ranging from 2x to 10X with each of its redundant telco providers. In addition, Platform28 only selects telco providers that have a minimum of two active, redundant switches, ensuring continuity within and between all providers in Platform28's network.

The methodology for the design of Platform28 network of data centers and telco trunking ensures that no inbound calls are blocked or receive a busy signal, regardless of significant peaks in call volume that may occur.

In addition, Platform28 will work with GTA and the Agency Customers, as needed, to provide a comprehensive analysis of inbound trunks, data connectivity, local PSTN services, and other telecom and data services. Where appropriate, Platform28 will services between agencies to reduce infrastructure costs for GTA or Agency Customer, while ensuring that the parties sharing the service will not experience any degradation in quality or capacity.

This analysis update will be done at least once per quarter, or at any point when there is a significant change in call patterns, staffing or other factor that may affect capacity.

GTA and Agency Customers may access Platform28's extensive BI interfaces to have visibility into trunk utilization at any point in time. More details are provided below in 2.6.3-2.



- 2.6.2.3 Service Provider may use either TDM or VoIP for trunking for the most efficient performance and price.

Platform28 meets this requirement.

Description: The Platform28 network includes massively scaled TDM and VoIP trunks to deliver efficient communications infrastructure for our clients. The capacity that exists in the Platform28 network of data centers ensures that no inbound calls are blocked or receive a busy signal, regardless of significant peaks in call volume that may occur.

To accomplish this Platform28 has over-provisioned capacity ranging from 2x to 10X with each of its redundant telco providers. Platform28 only selects telco providers that have a minimum of two active, redundant switches, ensuring continuity within and between all providers in Platform28's network.

As described above, Platform28 supports 150,000 active daily users and nearly 600,000,000 interactions monthly, ensuring that the capacity available will provide economies of scale to reduce price and significant resiliency and performance.

Furthermore, in the case of GTA and Agency Customers, Platform28 will use this infrastructure to provide service in most rate centers throughout the State of Georgia, enabling a local footprint for should Agencies request local presence and potentially significantly reducing telecom costs.

### 2.6.3 Data network requirements

Data network requirements described below are for optional VoIP termination to Agency contact centers.

- 2.6.3.1 Service provider can propose end-to-end data connection for call centers and agents where applicable or leverage existing State protected networks.

Platform28 meets this requirement.

Description: Platform28's HCC solution can be delivered across a customer's existing managed network, broadband and other connections. Platform28 also has extensive experience working with customers to design and deploy new networks, with end-to-end connectivity for call centers and agents. Platform28 works with network providers to set up local, metro wide-area and international circuits. In addition, Platform28 has deep commercial and technical experience working with telecom carriers to set up

circuits, phone numbers, routing, translation, number portability, and toll free services.

Platform28 has worked over the last 8 years extensively with GTA to integrate and use the State's MPLS data network. This experience and expertise would be leveraged to provide GTA, and any Agency Customer, with a single point of contact to manage and administer end-to-end data services.

Platform28 will be able to provide a higher level of support to GTA and Agency Customers by being a single point-of-contact that will be delivering both data and telecom services.

2.6.3.2 Service provider will provide a tool(s) for self-assessed bandwidth requirements and voice quality performance.

Platform28 meets this requirement.

Description: Platform28 has extensive experience with data and telecommunications networks, including the requisite monitoring and on-going administration. Platform28's Network Management systems continually monitor all voice and data circuits for capacity, usage, quality, and service availability. In addition, Platform28's voice network monitoring systems are capable of providing MOS scores on all calls, to qualitatively measure voice quality.

Information collected by the Network Management System is fed into the metrics system, and is available for BI dashboarding and reporting purposes. Platform28 can, as part of initial setup, configure Dashboards that reflect near real-time information on trunk utilization, data network utilization, voice quality, etc. These can be customized per Agency Customer, if required so that individual Agencies can see their usage of the system.

In addition, Platform28 has developed its own Agent Desktop with integrated SIP soft phone. The soft phone includes tools to evaluate jitter, latency, and echo, and to provide those tools for centralized evaluation and diagnosis. In addition, the Agent Desktop Agent Statistics and Analytics display allows agents to locally view the quality of their voice quality. If a constituent indicates they're having trouble hearing an agent the agent can instantly understand whether the issue is most likely happening locally or on the constituent's end.

2.6.3.3 Setting up, supporting, operating and maintaining data circuits and VoIP circuits (if applicable) as required.

Platform28 meets these requirements.

Description: Platform28 has extensive experience working with data network providers to set up local, metro wide-area and international circuits. In addition, Platform28 has extensive experience working with telecom carriers to set up circuits, phone numbers, routing, translation, number portability, and toll free services. Furthermore, Platform28 has experience working with GTA to integrate and use the State's MPLS data network. This experience and expertise would be leveraged to provide GTA, and any Agency Customer, with a single point of contact to manage and administer end-to-end data services.

Platform28 will be able to provide a higher level of support to GTA and Agency Customers by being a single point-of-contact that will be delivering both data and telecom services.

## 2.6.4 VPN / Security for Transport

### 2.6.4.1 Provide end-to-end network security and monitoring

Platform28 meets this requirement.

Description: Platform28's network uses a variety of systems and procedures to maintain network security, including firewalls that support IPS and UTM. In addition, all of these systems and connections are monitored constantly by automated systems, as well as by the Platform28 Network Operations team.

In the case of GTA or Agency Customers, Platform28 will use either MPLS or point-to-point circuits (and maybe VPN over Internet for testing) with IPSEC VPN tunnels to encrypt voice and data within these pipes. In addition, Platform28's VoIP infrastructure supports both TLS and sRTP, allowing for fully encrypted voice traffic from the agent or business user's desktop, to our voice gateways.

Platform28's use of encryption, tunnels and point-to-point circuits provide a comprehensive end-to-end security solution. Coupled with Platform28's Network Monitoring systems, it offers a significant layer of security and monitoring for all data and voice networks provided by Platform28 for use by GTA or Agency Customers.

Please also see section 6.2 below for specific details regarding Platform28's unique ability to deliver the most secure end-to-end security, encryption and monitoring.

### 2.6.4.2 Provide Virtual Private Network VPN access

Platform28 meets this requirement.

Description: Platform28 uses industry standard IPSEC VPN tunnels to secure data between GTA or Agency Customers' locations and Platform28's data centers. In addition, MPLS VPN's are available in most cases, for an extra layer of protection (this affects MPLS cost and bandwidth). In addition, if certain Agency Customers require extra protect, even within their LAN, Platform28 can work with GTA to deploy VPN-to-Desktop solutions that will allow individual user VPN connections, thereby encrypting data and voice from the user's computer, all the way to the Platform28 datacenter.

Please also see section 6.2 below for specific details regarding Platform28's unique ability to deliver the most secure end-to-end security, encryption and monitoring.

## **3.0 Enhanced Contact Center Services**

### **3.1 Enhanced Quality Management**

The Service provider's solution addresses the requirements in this section with the following:

#### **3.1.1 Role based score cards with key performance indicators**

Platform28 meets this requirement.

Description: Platform28's scorecarding system allows the Agency to create a virtually unlimited number of "evaluation forms". Each form consists of number of "criteria". Each criteria may have a score range, mark-down, or mark-up associated with meeting the criteria, or it may be based on a specific score within that criteria (i.e. Listening skills : 1-5). This flexible framework allows extremely detailed and accurate evaluations to be created.

At the beginning of a scoring/evaluation, the person performing the scoring or evaluation ("evaluator") is allowed to select an evaluation form. The list of available forms will be restricted based on the queue the call is on, the team the agent is on, etc. Once a form is selected, the evaluator simply goes through the evaluation form and scores the particular agent against the specific call. The call recording is available as well, and full "player" controls are given so that recordings can be paused/stopped/started. Furthermore, Platform28 uses speaker separation stored as stereo channels, allowing the evaluator to listen to the caller, agent, or both as desired.

Once evaluations are completed, the Platform28 BI and Reporting systems can be used to provide aggregate data about evaluations, and to understand KPI's as compared to specific queues, agents or teams. The reporting can be customized for almost any imaginable type of analysis of these KPI's.

An image of one of Platform28's scorecards is below. Scorecards can easily be customized as needed.

### 3.1.2 Integrated Learning Tools

Platform28 meets this requirement.

Description: Platform28’s open architecture has the ability to integrate with third-party Agent Training and Coaching tools. These tools can be used to fill off-phone time with activities that improve agent performance and productivity. This facility shall be used to satisfy any requirements that GTA may have with respect to integrated learning tools. Platform28 will work with and recommend GTA and/or individual contact centers managers to identify the best each situation.

### 3.1.3 Coaching Management Tools

Platform28 meets this requirement.

Description: Platform28 implements several models for coaching management tools. Live coaching, side-by-side agent to agent coaching, post-call coaching and team scoring and evaluation are all part of Platform28's quality management tools.

In addition, Platform28 can integrate with 3<sup>rd</sup> party training and coaching applications, including automated tools that push coaching to agents through integration between the training application, WFM and Platform28. The tools are regularly used to improve onboarding ramp up times, coach to improved learning curves, or coach high performing agents to develop supervisor skills.

3.1.4 Enhanced correlation of reporting, optimization and forecasting of key performance indicators.

Platform28 meets this requirement.

Description: Platform28's reporting system provides correlated reports of KPI, agent performance, and other standard data. Platform28 further integrates with 3<sup>rd</sup> party WFO systems to use this data to provide optimized scheduling and forecasting of KPI's based on agent scheduling, past volume, etc.

Described below, Platform28's delivers 3 types of WFM products, all of which are integrated with Platform28's data sources and can be used for reporting, optimization, and forecasting of KPIs. Enhanced Workforce Management

The Service provider's solution addresses the requirements in this section with the following:

3.1.5 Provider should describe the workforce management capabilities with their offering

Platform28 meets this requirement.

Description: The Platform28 delivers 3 types of workforce management solutions, depending on requirements of each implementation.

Basic WFM leverages the widely used Erlang method of forecasting and includes complete shift management, forecasting, shift adherence, shift swapping, standard reporting and ad hoc reporting features using standard Erlang analysis.

The Enhanced Analysis version of Platform28's workforce management solution provides significantly more granular analysis than Erlang. The Enhanced Analysis version uses -by-second analysis of queue times across incremental hour parts, something that all Erlang tools miss. This allows calls that overlap standard 15- or 30-minute reporting periods, plus dropped calls, to be included in the analysis, a major cause of call backup and missed SLA adherence. This is particularly true when the 'Monday' or 'post-holiday' call spikes are not accounted for in forecasting.

Platform28 also offers an SCO, or forecasting-only, solution. This allows customers to keep their existing WFM. CDR data from Platform28 is fed into the SCO tool for analysis and creation of a forecast. These more accurate forecasts are then entered into the customer's existing WFM tool.

Both Enhanced and SCO result in significantly great SLA adherence, reduced agent stress, reduced telco costs, and, frequently, reduced headcount.

### 3.1.6 Ability to analyze customer interactions

Platform28 meets this requirement.

Description: Platform28's Enhanced WFM and SCO forecasting tools are, by definition, tools for the analysis of customer interactions. Platform28's Business Intelligence applications include the ability to view and analyze contextually relevant customer interactions. (See complete analysis features above.)

Platform28 will also release an enhanced version of the Business Intelligence application in Q3, 2014, that includes the ability to conduct complete statistical and comparative analysis within the application and compare those interaction results to previous date periods, lines of business, or agents.

### 3.1.7 Leverage call data to adjust scheduling

Platform28 meets this requirement.

Description: As noted in 3.2.1 above, all three of Platform28's WFM solutions include the ability to use previous call data to create forecasts and adjust scheduling.

The Enhanced version of Platform28's WFM solutions also include the ability to automatically reforecast intraday, nightly or weekly. If extraordinary events drive calling activity to levels that were not anticipated from historical variations, the system can be set to reforecast to accommodate the new second-by-second details of the spike.

### 3.1.8 Identify customer and employee behavior

Platform28 meets this requirement.

Description: Platform28's WFM solution, reporting system and business intelligence application provide the capabilities to identify individual customer, customers in aggregate, individual agent, and agent group behavior.



The WFM solution also includes several customer and employee behavior analysis features, including the Forecast vs. Schedule vs. Actual Report, which takes into account 12 customer and behavior types. Scheduling planners use this report to conduct a gap analysis between any combinations of time series, redial effects, and other criteria. In addition, Adherence Reports enables planners to look at the effects of employee behavior, including things as detailed as a call that runs several minutes long, pushing an employee to start their break late. The system takes into account these types of adherence issues and plans for them in forecasting.

### 3.1.9 Ability to perform short term and long term forecasting

Platform28 meets this requirement.

Description: Platform28's WFM solution includes the ability to perform short term and long term forecasting.

Platform28's WFM solution includes the ability to perform short term and long term forecasting. There is no upper limit to the number of weeks, months or years in advance that forecasts can be prepared. Forecasting parameters allow for rolling weeks, rolling months, rolling years, monthly billing cycles and combinations of all of the above. Automatic 'seasonalization' and automatic holiday effects can be included in any forecast for any date range.

### 3.1.10 Provide for skills improvement and coaching

Platform28 meets this requirement.

Description: As noted, Platform28's quality management solutions include complete scorecarding and coaching features. Platform28's WFM solution evaluates demand on a second-by-second basis for agents, by skill and the system uses this information to identify scheduling opportunities for off-phone activities, including training, coaching and e-learning. Additional details are provided above.

### 3.1.11 Provide data to forecast schedules for shift assignments

Platform28 meets this requirement.

Description: As noted in detail above, data regarding interaction volumes is used internally by Platform28's WFM system and can be exported to 3<sup>rd</sup> party WFM solutions. All three versions of Platform28's WFM tool take use CDR data to forecast schedules for shift assignments. Platform28's Enhanced WFM solution can take real-time data and reforecast schedules on the fly based on unexpected or dramatic changes in call volume.

### **3.2 Customer Relationship Management (CRM)**

The Service provider's solution addresses the requirements in this section with the following::

- 3.2.1 Provider should list integrated and separate CRM options as well as ability to leverage existing CRM sources.

Platform28 meets this requirement.

Description: The ability to provide robust, flexible, and highly secure integrations between the contact center solution and CRM applications is a strength and differentiator for Platform28. As described below, Platform28 has two methods for managing CRM integrations. Once integrations are in place, Platform28 enables customers to use its Business Intelligence application to aggregate contact center platform and CRM data to get a powerful view of activities in the Center, presenting only the most relevant data within user-specific dashboards. Together, integrated CRM and Business Intelligence allows managers to view the effectiveness of incident response, types of personalized engagement, and other categories for insight into the organization and its customers.

Platform28 supports simple integrations using our configurable screen-pop mechanism, which allows any call-level meta data to be pushed to the CRM during the screen pop. This mechanism is sufficient for many organizations to provide an integrated CRM view for agents.

Platform28 also provides a 100% open REST API, and uses programmable web-services to allow bi-directional interaction of Platform28 and the CRM. Platform28's unique API allows the CRM programmer or administrator to access and control all aspects of Platform28's operation (in real-time) via the REST API. This includes the creation, modification, and deletion of users, queues, locations, customers, teams, roles, etc. Platform28 also supports both real-time and batched data push to the CRM.

The Platform28 Agent Desktop has a built-in REST web server, allowing for AJAX interaction between any web application and the desktop, for telephony and data control or query. In addition, this REST server can be contacted by any locally installed application, allowing simple 'bridges' to be built to support COM/OLE and other operating system specific integration mechanism.

Platform28 has integrated with a wide number of commercial and internally developed applications. Details of integration between Platform28 and GTA CRM platforms will be conducted during further scoping.

- 3.2.2 Provider should have the capability to migrate existing CRM data into a replacement option.

Platform28 meets this requirement.

Description: Platform28 will work with GTA to integrate with CRM's and provide any assistance required with respect to data transfer from old to new CRM's.

Platform28 regularly works with customers to provide engineering resources to help with tool assessment, migration planning and integration. Platform28's integration capabilities are outlined above and integration methodology is outlined below in section 4. Part of the engagement includes development a phased plan to export data from the production CRM to the newly selected tool, manage testing and iterative deployment into production, with rollback/fallback planning.

The extent and scope of work required to migrate GTA and Georgia state agencies to a replacement CRM solution will be determined post the initial assessment.

## 4.0 Transition Requirements

### 4.1 Setup & Transition

The Service provider's solution addresses the requirements in this section with the following::

- 4.1.1 Service Provider will provide appropriate technical resources to guide, design, configure and implement all contact center functionality including call scripting and call flows, etc.

Platform28 meets this requirement.

Description: Platform28 shall provide appropriate technical resources to guide, design, configure and implement all contact center functionality including call scripting and call flows, etc.

Platform28 follows a proven process in all deployments, including the following steps:

#### **Clarifying Platform Approach and Goal**

The Platform28 approach to system deployment is to build manageable amounts of complexity in well-defined phases. The flexible nature of the Platform28's Hosted Contact Center solution creates the foundation for greater functionality, integration, and efficiency, making the phased approach feasible and desirable.

We believe it is best to build in increments that can be changed without requiring a complete system overhaul. It is important to note, however, that while Platform28 recommends phased implementations, our approach is to establish an objectives roadmap that covers business, functional and technical requirements as early in process as feasible. This understanding of our client's multiple, and sometimes competing, objectives paves the way for a successful deployment and transition to the Platform28 Hosted Contact Center.

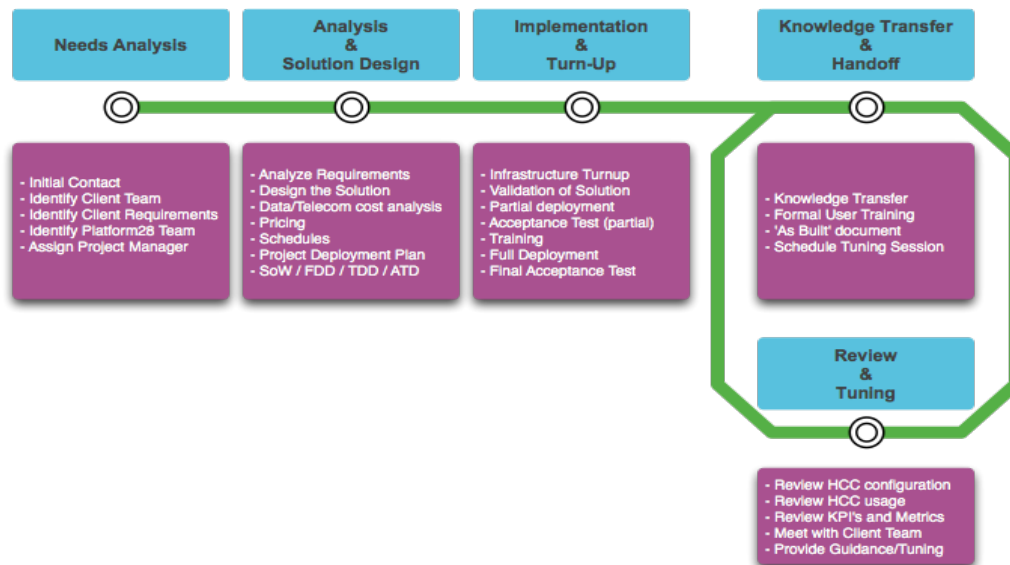
- Our assistance is designed to increase the effectiveness and success that our clients have in employing the new processes and technologies that Platform28 offers, and can be summarized in a few broad categories:
- Introducing a proven methodology for the engagement
- Establishing processes that deliver consistent and trustworthy interactions to users
- Helping to develop a skilled team through hands-on training with our administrative web portal, BI, reporting and Agent Desktop

- Helping the team be effective by training them on best practices from an industry perspective and with respect to the Platform28 Hosted Contact Center
- Providing expertise to help evaluate alternatives or review assumptions
- Providing a single point of contact and project management to execute on a clearly defined plan, tied to specific success criteria during the transition to the Platform28 Hosted Contact Center
- Provide ongoing guidance, audits and recommendations geared towards increasing the customer satisfaction rate by improving the performance and efficiency of the contact center, while reducing costs and variability.

*It is Platform28's goal during each client engagement, to meet or to exceed all of the identified objectives, while providing a smooth and easy transition client's staff - from agents to management - in a timely manner.*

**Introduce a Disciplined Methodology**

Platform28 follows a normalized project management methodology to assure project repeatability and consistency. This process defines a set of actions and milestones, each with a responsible party, which must be executed for successful completion of the engagement.



### **Phase 1: Needs Analysis**

The initial contact with a prospective client (“Client”) is generally completed by the Platform28 sales team. The individual responsible for the account (“Sales Representative”) will then qualify the prospect, understand their market potential, understand competitors that they may be in dialogue with, their time-frame, general requirements, and applicability/overall effectiveness of the Platform28 solution in the Client environment. At this point, Platform28 will qualify the Client’s financial and business viability via a 3<sup>rd</sup> party service. If all basic requirements are met then a “Needs Analysis” meeting will be scheduled between the Client and the assigned Platform28 team.

It is Platform28’s policy to focus on engaging with a cross section of the Client’s staff (“Client Team”) that is responsible for their contact center. This cross section generally includes management, operations, information technology, telecommunications, data processing and business process automation. Depending on the Client size and industry, some of these roles may be shared or not applicable, and the process is adjusted accordingly.

During the Needs Analysis, Platform28 Sales, Pre-Sales Engineering, Network Engineering, and Software Engineering resources will engage with the Team to gather and document existing contact center solutions and processes (if applicable), immediate and longer term needs, current issues the Client is facing (if any), as well as all business, functional and technical objectives that they may have. These include, but are not limited to:

- Business & Commercial Requirements
- Telecommunications and Data Interconnect Requirements
- CRM and Data Integration Requirements
- IVR and Call Routing Requirements
- Security and Data Security Requirements
- Training and Documentation Requirements
- Rollout and Timeline Requirements

Collectively, this information constitutes the “Client Requirements”, against which the solution shall be designed and delivered.

Based on the understanding of proposed scope, specific teams from Platform28 will be involved in the further analysis and design, as well as the delivery of the Hosted Contact Center solution. These teams will cover all areas relevant to successful delivery of every

aspect of the Client Requirements. These teams will then hold a joint information sharing session to discuss the Client Requirements, and to ensure that each team member is aware of all the factors that will be applicable to Client. At this meeting the Sales Representative and Professional Services will determine and assign a Project Manager for the remainder of the effort.

Each functional discipline within Platform28 will now focus on their respective area of competency to analyze the Client Requirements. The singular objective during the this period is to quickly understand the nuances of any stated objectives, obtain clarifications via communications with the Client Team, and to gain a comprehensive understanding of the needs and drivers of the Team that will be using the Platform28 Hosted Contact Center solution.

This 'information gathering' phase will generally continue for a duration ranging from one or two days to several weeks, depending on the complexity and size of the engagement. During this phase, the Platform28 team aims to identify the following (this is not a complete and exhaustive list):

- Contact Center call flows, Queues, Prompts, and Agents.
- IVR call flows and Prompts.
- Identify time line for completion.
- Identify and document all existing architecture including the telecommunication switch.
- LAN and WAN configuration of contact center
- Bandwidth requirements
- Toll or Toll Free service requirements
- Desktop integration requirements [screen pop]
- Agent / Business user machine specification
- Identify any custom applications, gateways or web-service bridges to be developed.
- Identify and document all agent processes that currently are in place to ensure that training or re-engineering of those processes is identified.
- Agent work flow and agent interaction with existing work flows.
- How Platform28 will support and work with the CRM software workflow.
- Identify and document all new call flow and interaction
- Understand and document any team routing scenarios.
- Identify any last agent call routing scenarios.
- Identify all default routing.
- Identify any special requested routing scenarios.
- Review call flow documents and draft all call flows.

## **Phase 2: Analysis & Solution Design**

During the Solution Design phase, Platform28 technical resources will analyze the Customer Requirements and determine how they can be satisfied with features of the Platform28 Hosted Contact Center, professional services engagements, training engagements, etc.

This phase also includes the analysis of telecommunications and networking requirements and cost, hardware requirements and costing for any additional hardware or software, as well as sizing and costing for telecomm services — Toll, Toll-Free, or VoIP. The goal of this phase is to complete the analysis and for Platform28 personnel to have a comprehensive understanding of the Client Requirements, and what Platform28 must do, and in what timeframe, to deliver the Client solution.

In parallel, the Sales, Project Management and Support teams will work together to determine Client viability, budgetary pricing, and deployment and training timelines. Sales will concurrently work on developing all required contracts and start legal review of any additional required documents. These documents will include a Master Services Agreement, Solution Description, and Budgetary Estimate. This would also include costing for any one-time and recurring charges, professional service fees, extra training (on site).

Once the analysis is complete, the teams will meet again to kick off the Solution Design. During Solution Design period, Platform28 teams will share responsibilities and work to design and specify the Platform28 Hosted Contact Center solution that will be used by the Client. This solution design includes all aspects of the proposed solution — IVRs, Prompts, Users, Queues, Routers, Schedules, Roles, and other configuration. The solution design document will contain details on any further aspect of the system that must be analyzed before the full solution can be implemented.

In parallel, Platform28's Project Management will use the specifications of the solution, as well as data gleaned throughout this phase to develop a comprehensive Project Schedule for Client to be deployed on Platform28 Hosted Contact Center.

At the end of this phase, the Platform28 technical teams will deliver:

- Functional Design Document  
A functional description of the proposed workings of the solution suitable for non-technical stakeholders. It is meant to explain how the requirements will be fulfilled and to gain Client approval of the functional behavior of the solution. This document will be an attachment to the SoW and must be signed-off by the management or other responsible individual at Client, signifying approval. After acceptance, the Functional Design Document will only be changed via the change



management process.

- Technical Design Document  
A highly technical document describing the exact nature of any changes, additions, enhancements or integration that will be done to enable Client to use Platform28's Hosted Contact Center. This document will be an attachment to the SoW and must be signed-off by the management or other responsible individual at Client signifying approval. After acceptance, the Technical Design Document will only be changed via the change management process.
- Acceptance Test Document  
The Acceptance Test Document is a detailed list of procedures intended to test the functionality of the Platform28 Hosted Contact Center, as it pertains to satisfying the Client Requirements. Each of the test procedures will be documented in detailed steps so as to be exact and replicable. The expected results are also documented. This document will be an attachment to the SoW and must be signed-off by the management or other responsible individual at Client, signifying approval. After acceptance, the Acceptance Test Document will only be changed via the change management process. At the conclusion of the Deployment phase, the Acceptance Tests shall be executed, and successful execution of the Acceptance Test procedures will indicate the success of the project.
- Statement of Work  
The Statement of Work ("SoW") will have detailed specifications of the entire Client Solution. This document will contain the Project Definition, Change Management Plan, Schedule Management Plan, Communication Management Plan, Risk Management Plan, Quality Management Plan, Project Closure Plan, and Project Schedule, and Professional Services Plan. In addition, the Function Design Document, the Technical Design Document, and the Acceptance Test Document will be added as attachments to this document.

The documents produced by the technical teams will be added to the proposal packet that Sales will be submitting to Client for approval. This process moves to the next phase once the client has approved the proposal.

### Phase 3: Implementation and Turn-Up

During this phase, the Client will be transitioned over to the Platform28 Hosted Contact Center. Once the initial transition is complete, Platform28 will work with the Client to fine tune the system — while following the Change Management Plan — to ensure adherence to the process. Any changes made at this stage may affect multiple

documents, including the Acceptance Test Document and the Professional Services Plan. Furthermore, some changes may impact pricing.

Platform28's approach to implementation is to configure as much of Client's solution as is feasible in the HCC prior to actually beginning the transition at the Client's contact center. This allows for some level of sanity testing that ensures that the Client Requirements are being met by the Hosted Contact Center system, prior to making any changes in the Client environment. The Client will assist in validating all configurations that have been built in the Hosted Contact Center at this stage. All Clients are provided with a 'Sandbox' environment to set up and test changes before deploying them to production.

Once the initial build out of the Hosted Contact Center configuration has been validated, Platform28 and Client will initiate the cutover process. It is highly recommended that this initial cutover process be performed with Platform28 support staff on-site to enable immediate a quick diagnosis should a problem arise. Platform28 believes that increased onsite time generally increases the success and timeliness of the deployment and would be advocating onsite consulting wherever practical.

The exact process of transitioning the Client will differ from client to client, and will be dependent on the Client Requirements. In general, the transition may involve cutting over partial traffic, testing, and validating all aspects of the system, including reporting, recording, audit-trails, CDR's and call-flows. This may require that telecom, WAN, LAN and other infrastructure components be deployed first. All possible test scenarios from the Acceptance Test Document will be executed at this point to increase the confidence level of success on a full launch. Once the validation is complete, assuming that no issues are noted, full cutover may commence.

The first step in a full cutover is to execute the Training Plan, so that Client's technical staff is fully versed in the operations and administration of the Platform28 Hosted Contact Center. They will be provided with enough training to cover all administration, configuration, reporting and monitoring. In addition, they will be trained on basic troubleshooting procedures - including the process to collect log files or other audit data that may be required by Platform28 for troubleshooting specific issues.

If there is a Professional Services engagement involving customization of software, web-service integration, or custom reporting, this will be deployed at this stage, and functional and integration testing will be conducted in conjunction with Client's personnel.

At this point, the Client will be fully deployed on Platform28's Hosted Contact Center. All agents, as well as business users if applicable, will be moved from the legacy system to Platform28 Hosted Contact Center.

Once this transition is complete, the Client and Platform28 will jointly execute all test procedures in the Acceptance Test Document. Each scenario will be signed off by the Client and Platform28 based on the exact documentation and process in the Acceptance Test Document and any changes to the document made via the Change Management Plan.

Any failed tests will immediately trigger corrective procedures and Client will assist Platform28 to enable a speedy resolution to the issue. Platform28 will not be able to support Clients who wish to operate in a production mode, without passing all of the Acceptance Test procedures. Doing so poses a potential risk to the Client and to Platform28.

#### **Phase 4: Knowledge Transfer and Handoff**

Throughout the design phase all project documentation is updated for delivery at the system handoff meeting. This will provide Client with a detailed description of what has been put in, and what business objectives were served, by each aspect of the solution design.

The Platform28 deployment team will coordinate the Knowledge Transfer to the Client Team throughout the deployment process. At the conclusion of the project, the final documentation package, including the "As Built" document will be delivered to Client. A final Knowledge Transfer session will be conducted with the Client Team team to ensure that they fully understand the Platform28 Hosted Contact Center, and to maximize their ability to successfully manage day-to-day operations of the contact center.

Formal Platform28 training for business users, operations personnel and agents will be conducted onsite, if specified in the SoW. User training schedules will be outlined in the Project Schedule that was delivered with the SoW. Changes to the training schedule may affect project pricing, and may incur additional Professional Services fees.

Platform28 will schedule a Tuning Session 15-60 days post-installation to ensure Client is successfully leveraging all capabilities of Platform28's Hosted Contact Center. This will also be an opportunity to ensure that the initial Client Requirements were being met, and to provide any guidance on aspects that may have been missed or not covered by the initial SoW.

#### 4.1.2 Program network-based routing.

Platform28 meets this requirement.

Description: Platform28 shall program required network-based routing, to be identified during the needs assessment phase.

As described in 4.1.1, Platform28 has a disciplined process to document requirements regarding network-based routing, program all necessary configuration, test in a sandbox environment, confirm requirements are functioning as expected, and then deploy requirements into production.

#### 4.1.3 Configure call prompters.

Platform28 meets this requirement.

Description: Platform28 shall program all call prompters.

As described in 4.1.1, Platform28 has a disciplined process to document requirements regarding call prompters, program all necessary configuration, test in a sandbox environment, confirm requirements are functioning as expected, and then deploy requirements into production.

To provide further detail, Platform28 has an extremely flexible IVR and “tagging” system that allows the call to be routed based on user interaction, or based on interactions with back end systems via web services. This means that call prompting can be setup either with single digit responses, or timeouts, for simple selections like language, or a specific type of call within an agency. In addition, more complex prompting can include zip code based call redirection to specific queues or locations, re-routing based on caller entered data, such as a SSN, TIN, or other identifying information that can then be validated via web-services against the Agency’s CRM. In these cases, Platform28’s data separation features can be used so that calls can be directed to a specific agent or queue, without sending the PII along. Instead a unique tag can be added to the call that can be fed back to the CRM to gain access to the customer.

#### 4.1.4 Configure transfer connect and advanced features.

Platform28 meets this requirement.

Description: Platform28 shall configure transfer connect and specified advanced features related to transfer functionality.

As described in 4.1.1, Platform28 has a disciplined process to document requirements regarding transfer connect and other advanced transfer requirements, program all necessary configuration, test in a sandbox environment, confirm requirements are functioning as expected, and then deploy requirements into production.

Further details on Platform28's call transfer capabilities are as follows: Platform28 provides all the normal transfer capabilities, which are configurable per queue. The supported transfer modes are (a) cold transfer, (b) consult transfer, (c) warm transfer, and (d) conference. During conference, the agent can put either the caller or the transfer-party on hold, switching the call to a consult mode, and can then switch back and forth as often as is necessary. In all transfer modes, Platform28 allows 'notes' to be sent along with the transfer request, allowing the transfer recipient to have more concise and useful data about the incoming transfer request.

Platform28 allows transfer to a specific business user, a specific agent, a team, a queue, an IVR, or an external PSTN number. This allows virtually unlimited options in terms of what can be done with the call during the transfer.

Platform28 provides an incredible flexible transfer facility, that when integrated with the CRM, delivers several unique features. For example, on an integrated system transfer initiation, transfer party selection, and notes can all be set automatically by the CRM, and might be triggered by a single button click on the CRM interface. In addition, Platform28's transfer mechanism separates each transfer into three phases, transfer preview, transfer conference, and transfer completion. This allows Platform28's Agent Desktop to screen-pop three different URL's during each transfer. By using the transfer preview, an integrated CRM allows the transfer recipient to see the state of affairs during the preview, Platform28 allows the transfer recipient to make an informed decision about whether they should accept the transfer, or whether they can inform the initial agent about how to better handle the call. In addition, the separation of transfer completion and transfer conference allows the CRM to present different views of the data during a consult or conference phase, than when the call is being previewed.

- 4.1.5 Setting up, supporting, operating and maintain IVR, Auto Attendant, after-hours processing, call recording and other associated systems required to process calls and allow end-users to control after initial set-up.

Platform28 meets this requirement.

Description: Platform28 shall configure, operate and support IVR, Auto Attendant, after-hours processing, call recording and other associated systems required to process calls. Agencies may select, as identified in the needs assessment phase, to control the system after initial setup. Platform28 will ensure that Agency staff are properly trained to

perform those functions (see standard and ad hoc training detailed above) and will maintain 24x7x365 support.

As described in 4.1.1, Platform28 has a disciplined process to document requirements regarding self-service IVR (including necessary integrations), auto attendants and associated router configuration. (Note, Platform28 refers to its Routers features to configure time of day, holiday hours, and other routing rules within its HCC platform.) Platform28 shall program all necessary configuration, test in a sandbox environment, confirm requirements are functioning as expected, and then deploy requirements into production.

Please also see our response to section 2.6 above for further details.

- 4.1.6 Develop and implement plan to transition in-scope access numbers including toll and toll free numbers and any other specified numbers from the current Agency Customers' current Service Provider.

Platform28 meets this requirement.

Description: Platform28 has extensive experience working with telecom carriers to set up circuits, phone numbers, routing, translation, number portability, and toll free services. This experience and expertise would be leveraged to provide GTA, and any Agency, with a single point of contact to manage and administer these services. This service is offered by Platform28 to our clients as a means of reducing the typical 'finger pointing' that happens when issues are identified. It also allows Platform28 to architect and setup network level services and circuits that provide the highest levels of redundancy for our clients.

Platform28 will work with GTA and any client Agency Customers to develop and implement a plan to transition in-scope access numbers, including toll and toll free numbers, as well as any other specified numbers from the current Agency Customers' current Service Provider, as identified during the needs assessment phase. Platform28 will also manage and execute said plan to provide oversight and the 'single point-of-contact' to GTA.

Please also see question 4.1.1 above and RFP Attachment 2-B for further details on this process.

- 4.1.7 Setting up, supporting, operating and maintaining data circuits and VoIP circuits (if applicable) as required processing contact center services and supporting features or products.

Platform28 meets this requirement.

Description: Platform28 has extensive experience working with data network providers to set up local, metro wide-area and international circuits. This experience and expertise would be leveraged to provide GTA, and any Agency, with a single point of contact to manage and administer these services. This service is offered by Platform28 to our clients as a means of reducing the typical 'finger pointing' that happens when issues are identified. It also allows Platform28 to architect and setup services and circuits that provide the highest levels of redundancy for our clients.

Platform28 will work with GTA and any Agency Customers to develop, implement and execute a plan to setup and support data circuits and VoIP circuits (if applicable) as required for contact center services and supporting features or products, as identified during the needs assessment phase.

Please also see question 4.1.1 above and RFP Attachment 2-B for further details on this process.

- 4.1.8 Develop, implement and maintain call routing procedures, which define how calls will be received and allocated across multiple centers (if relevant) and within centers how calls will be distributed to queues. Develop, implement and maintain process for Agency approval/notification of changes to these procedures.

Platform28 meets this requirement.

Description: Platform28 shall develop, implement, and maintain call routing procedures, which define how calls will be received and allocated across multiple centers (if relevant) and within centers how calls will be distributed to queues. Develop, implement, and maintain process for Agency approval / notification of changes to these procedures, as identified during the needs assessment phase.

As described in 4.1.1, Platform28 has a disciplined process to document requirements regarding call routing rules, as is standard with all Platform28 deployments. Platform28 shall program all necessary configuration, test in a sandbox environment, confirm requirements are functioning as expected, and then deploy requirements into production.

- 4.1.9 Design, build, implement and maintain call routing tables based on criteria defined by Agency, which route calls to Agents based on Agent skill sets and availability.

Platform28 meets this requirement.

Description: Platform28 shall design, build, implement, and maintain call routing tables based on criteria defined by Agency, which route calls to Agents based on Agent skill sets and availability, as identified during the needs assessment phase.

As described in 4.1.1, Platform28 has a disciplined process to document, implement and maintain call routing tables. All of this documentation is shared with the Customer. Platform28 shall program all necessary configuration, test in a sandbox environment, confirm requirements are functioning as expected, and then deploy requirements into production.

- 4.1.10 Develop and maintain routing tables, which map inbound numbers to centers within centers to appropriate queues.

Platform28 meets this requirement.

Description: Platform28 shall develop and maintain routing tables, which map inbound numbers to centers and within centers to appropriate queues, as identified during the needs assessment phase.

As described in 4.1.1, Platform28 has a disciplined process to document requirements regarding call routing tables and their mapping with associated queues. (In addition, Platform28 can provide emergency routing plans which can be put into effect should an event occur.) Platform28 shall program all necessary configuration, test in a sandbox environment, confirm requirements are functioning as expected, and then deploy requirements into production.

- 4.1.11 Provide a certified project manager to work with agencies during implementation phase to plan, document, execute and communicate tasks for the entire implementation process.

Platform28 meets this requirement.

4.1.1 above describes Platform28's methodology for the assignment of a project manager, their role, and the process by which the project manager documents and coordinates timely and successful implementation of the HCC.

- 4.1.12 Provide build, user application testing, test and production lifecycle management.



Platform28 meets this requirement.

Description: Platform28 shall provide a certified project manager to work with agencies during implementation phase to plan, document, execute and communicate tasks for the entire implementation process.

4.1.1 above describes this process in detail, including sandbox, UAT, and ongoing tuning/lifecycle management.

- 4.1.13 Develop and implement procedures for re-routing calls in the event of center outages, emergencies, unexpected call volume spikes or overflows or other unforeseen circumstances during transition. Plan and changes are subject to approval by Agency.

Platform28 meets this requirement.

Description: Platform28 shall develop and implement procedures for re-routing calls in the event of center outages, emergencies, unexpected call volume spikes or overflows, or other unforeseen circumstances during transition. Plans and changes are subject to approval by Agency, as identified during the needs assessment phase.

Section 2.2 above provides details on routing rules. That section provides details on options for how Platform28 can address a natural disaster, unforeseen event, or other situations that may cause a significant spike in call volume. Platform28 provided details on this scenario in our on-site presentation of emergency routing rules, and additional scenarios can be documented and implemented during the process outlined in 4.1.1 above.

## 5.0 Training and Support

### 5.1 Training

The Service provider's solution addresses the requirements in this section with the following:

#### 5.1.1 E-Learning, browser based, including training materials and/or videos.

Platform28 meets this requirement.

Description: Platform28 provides on-site and web-based training for contact center users based on user's specific role within the organization (agent, supervisor, administrator, developer, executive) as a standard part of every customer engagement. The location and scope of training is often modified based on our customer's specific needs.

Several weeks prior to production deployment of a new customer, Platform28 trainers schedule their training programs and provide access to online training and help materials. Customers are encouraged to review this material ahead of the scheduled training date(s). Based on role, training takes as little as 2 hours or as much as 3 days.

Platform28 also provides weekly web-based training, upon request, as well as quarterly training on recently released features and updates.

As part of Platform28's implementation Process Guide, engineers and/or contact center operations specialists go on-site at the customer location 30 days after customer has been put into production, and every quarter thereafter, for an optimization analysis. Platform28 staff will spend either a half-day or entire day watching the activities of agents, supervisors, administrators, and then provide a written report with suggestions for efficiencies or best practices.

When Platform28 was awarded its initial contract with GTA (what now covers nearly 70,000 daily users and nearly all State agencies), Platform28 conducted approximately 100 on-site training sessions, web-based training, and audio conferences. In addition, as staff has changed, Platform28 continues to provide training. While that training methodology and the media types used have expanded significantly in the last 8 years, we are strongly positioned to continue our work with the Agencies we already know to train and support staff.

#### 5.1.2 Reference guides for ongoing support.

Platform28 meets this requirement.

Description: Platform28 training guides can be provided in electronic form and are also available on Platform28.com/on. In addition, the HCC solution includes help and tool tips on every page, for quick lookup of items in context. Finally, for Agencies needing to familiarize themselves with the Platform28 HCC, we provide a Quick Start Guide, that shows the primarily roles and functions within the system.

5.1.3 Provide onsite training for initial implementation.

Platform28 meets this requirement.

Description: Platform28 conducts on-site training as a standard part of each implementation. Please see above for additional details.

As noted above, Platform28 provided has provided nearly 100 agency-specific, regional, and ad hoc training for several thousand Georgia state employees through its engagement with AT&T. We are very familiar with the agencies and culture within the State for the adoption of constituent contact management tools. Similar training can be requested through this engagement.

5.1.4 Provide training for supporting integration, Agent & Supervisors and End-Users for the use of the contact center services systems.

Platform28 meets this requirement.

Description: As noted above, as is standard in the Platform28 implementation process, we conduct role-specific training with appropriate documentation. Additional customized training is regularly provided.

## **5.2 Technical Support**

The Service provider's solution addresses the requirements in this section with the following:

5.2.1 Service Provider provides a service desk including 24x7x365 coverage accessible through voice, email, web, chat.

Platform28 meets this requirement.

Description: Platform28 provides complete 7x24x365 service desk support for contact center services. The Solution Center is accessible via voice, web and email. (Chat support will be available in Q3 of this year.)

Complete details of The Solution Center, online support, and online ticketing are outlined in Platform28's responses in Attachments 3A and 3B.

The process for incident notification, identification of the severity of the issue and Solution Center support is as follows:

The Platform28 Solution Center is available 24x7x365 with live answer support for all urgent and high priority incidents. Lower priority tickets are handled during normal business hours (8 am and 8 pm EST Monday through Friday). The Platform28 Solution Center is the first level of incident escalation.

During the tenure of our contract with GTA, providing communications solutions for nearly 70,000 state employees daily and nearly all Georgia state agencies, Platform28 has distinguished itself with exceptional customer support. We hear this regularly from agencies and this sentiment is echoed more broadly from our customers outside of our work for the State of Georgia. It's a great source of pride at Platform28 in being the best communications provider our customers have worked with. Period. Support issues that often require days or weeks for competitors to satisfy are regularly done in the middle of the night or over the weekend by our support staff. While we know we have the right HCC technology solution to support GTA and Georgia state agencies, it's our understanding of the culture, fit and requirements that makes us the strongest choice.

- 5.2.2 Receive notification of events, system issues, status and updates or can be provided as a web portal.

Platform28 meets this requirement.

Description: As noted, Platform28 provides online ticketing to report and track all support issues. Users can receive notifications by email of the status of support issues.

- 5.2.3 Hosted Contact Center supported by staff that is physically located within the United States.

Platform28 meets this requirement.

Description: Platform28 support staff is located within the United States.

## 6.0 General Requirements

### 6.1 Pricing Model

The Service provider's solution addresses the requirements in this section with the following:

- 6.1.1 Ability to provide a Per Seat subscription model, including quick scalability pricing.

Platform28 meets this requirement.

Description: Platform28 uses a subscription-based, per seat pricing model for all of its agreements.

There is no additional cost to GTA or Georgia state agencies if rapid scalability is required.

- 6.1.2 Ability to provide tier volume discounts to individual agencies based on projected enterprise volumes.

Description: Platform28 has opted to extend its deepest discounts for use at all volume tiers, regardless of size of contact center or volume usage. This price is competitive for smaller GTA and Georgia agency contact centers and extremely competitive for larger centers.

- 6.1.3 Basic Seat pricing should include all features and functions (seat, email, chat, fax, etc.) with the exception of enhanced workforce management, Customer Relationship Management and Customer Surveys.

Platform28 meets this requirement.

Description: Platform28 seat pricing includes all features and functions (seat, email, chat, fax, etc.), with separate line items for enhanced quality management and customer surveys.

Please see rate cards for details.

- 6.1.4 Provide inclusive toll-free services and per-minute toll-free services for competitive pricing.

Platform28 meets this requirement.

Description: Platform28 can provide per seat pricing inclusive of toll-free services as well as per seat pricing and toll-free services presented separately.

Agencies should specify in their RFQ that they would like Platform28 to present this pricing option in its response.

6.1.5 Provide a rate-card for optional professional services.

Platform28 meets this requirement.

Description: Platform28 provides professional services at a daily, weekly and monthly rate.

Platform28 has provided a separate rate card for optional professional services.

6.1.6 Per-seat pricing should include all installs, moves, adds or changes (IMAC).

Platform28 meets this requirement.

Description: Platform28 pricing is inclusive of installation, adds, moves and changes. Installation does not include professional services including but not limited to network configuration, integration, and desktop configuration.

6.1.7 No minimum requirement for the number of seats contact centers required to purchase.

Platform28 meets this requirement.

Description: Platform28 pricing includes no minimum number of seats required to purchase.

6.1.8 Ability for Agencies to add seasonal seats at any time without implementation or disconnect fees.

Platform28 meets this requirement.

As noted, Platform28 allows Agencies to add or contract the number of seats in use at any time without any implementation or disconnect fees.

6.1.9 There should be no implementation fee or other fees besides the monthly reoccurring seat charges imposed for upgrading and downgrading solution capabilities.

Platform28 meets this requirement.

Description: Platform28 will allow agencies to seasonally scale to meet demand without implementation or disconnect fees.

Platform28 doesn't charge any additional fees to scale up or down capacity within the system or the number of seats.

- 6.1.10 Ability to provide pricing that can include upfront transition costs within the per-seat price (amortized over the life of the contract) as well as priced separately.

Platform28 meets this requirement.

Description: Platform28 can provide both pricing that reflects transition costs (if any) amortized over the course of the agreement and included in per seat pricing, as well as transition costs separately broken out.

Agencies should specify in their RFQ which method they would like Platform28 to quote for services.

- 6.1.11 Provide a-la carte pricing for other than basic seat, such as Enhanced Quality Management, Enhanced Workforce Management, Customer Relationship Management and Customer Surveys, etc.

Platform28 meets this requirement.

Description: As is standard in Platform28 pricing proposals, we present per seat pricing and a la carte pricing additional features, including enhanced quality management, enhanced workforce management, and customer surveys.

## **6.2 Security Requirements**

The Service provider's solution addresses the requirements in this section with the following::

- 6.2.1 Provider must comply with the State and Agencies data integrity and privacy policies for the delivery of the contact center services.

Platform28 meets this requirement.

Description: Platform28 will comply with all State and Agency-specific data integrity and privacy policies for the delivery of contact center services.

Platform28 uses encryption and tokenization in ways that have allowed the company to be a leader in delivering data security and data integrity. The way we deliver security features is substantially different than other companies on the market.

Data Integrity - Platform28 uses a horizontally scaling, geographically distributed database that ensures the integrity of all data residing within the system. The database itself is sharded across all infrastructure within each data center, ensuring replication and dramatically improving performance over traditional data environments. As the amount of data residing within the Platform28 ecosystem increases, the system automatically scales out the database across additional service capacity, as needed.

Data Encryption within the Database - The database Platform28 uses the highest levels of database encryption, including complete database-level and field-level encryption.

Data Separation - Platform28 also uses a unique method of tokenization that allows for complete data separation and ensures that no PII, PHI, or other sensitive data is ever written to any Platform28 infrastructure. Displayed in the call flow below, data separation uses a web service connection to the customer's data repository (CRM, ERP, ticketing system, etc.). Constituent information is captured in the IVR and kept in-memory while it's passed to the customer's data source. The data source passes back a unique token and constituent information without sensitive data, which is then used to route the call/interaction appropriately. Platform28 then pops the customer's CRM system that displays sensitive data. The token is used to send data back to the customer's data source for aggregated reporting or used within Platform28's BI and reporting tools.

This methodology has allowed Platform28 to provide HCC services in highly regulated environments by introducing a method of interaction management that keeps hands completely off of sensitive data. This is a differentiator and ensures a much easier process of incorporating new systems into customers for whom security is a priority.

Data Encryption Between Platform28 and Agents – Platform28 manages encryption of both voice and data across the network from the HCC to Agents in several ways.

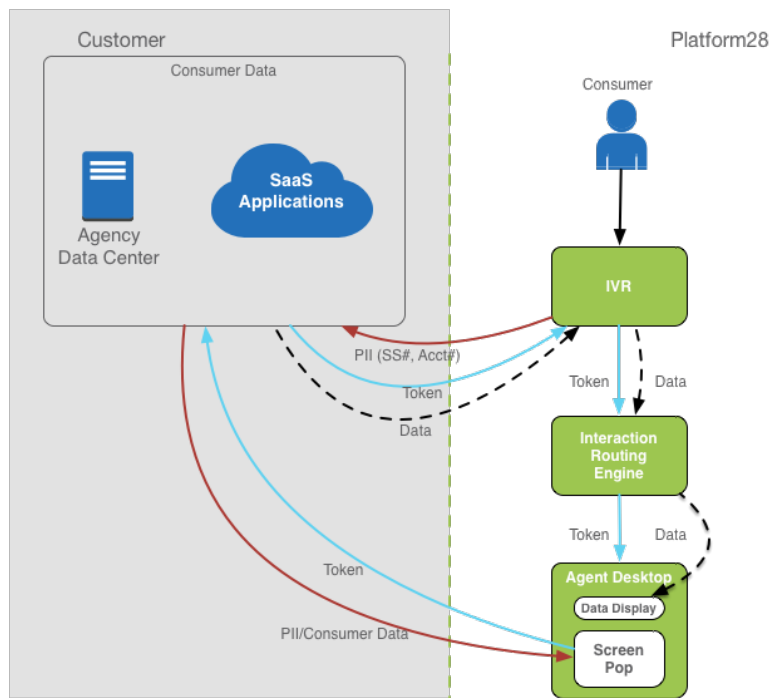
As detailed in the topology presented in the question below, Platform28 can provide services to agents at offices using the current managed MPLS connection, using the native encryption of that network connection. If Agencies choose for Platform28 to provision new MPLS connections, Platform28 can deliver identical encryption. If Agencies require connecting via a regular broadband connection, Platform28 will encrypt all traffic using IP/SEC. Finally, when connecting directly the Agent Desktop for remote/home-based agents using broadband connections, Platform28 encrypts *both* voice *and* data using TLS/SRTP. This is possible because Platform28 developed its own Agent Desktop



with integrated soft phone for greater security and significantly more granular administration and logging.

Note, variations of all of these security and encryption methods are available, based on customer requirements.

Provided below is a representation of the way that Platform28 can use encryption or tokenization to ensure to deliver the highest level of data integrity:



6.2.2 Provide encryption for VoIP calls that meet or exceed IRS Publication 1075 requirements, if required by Agency.

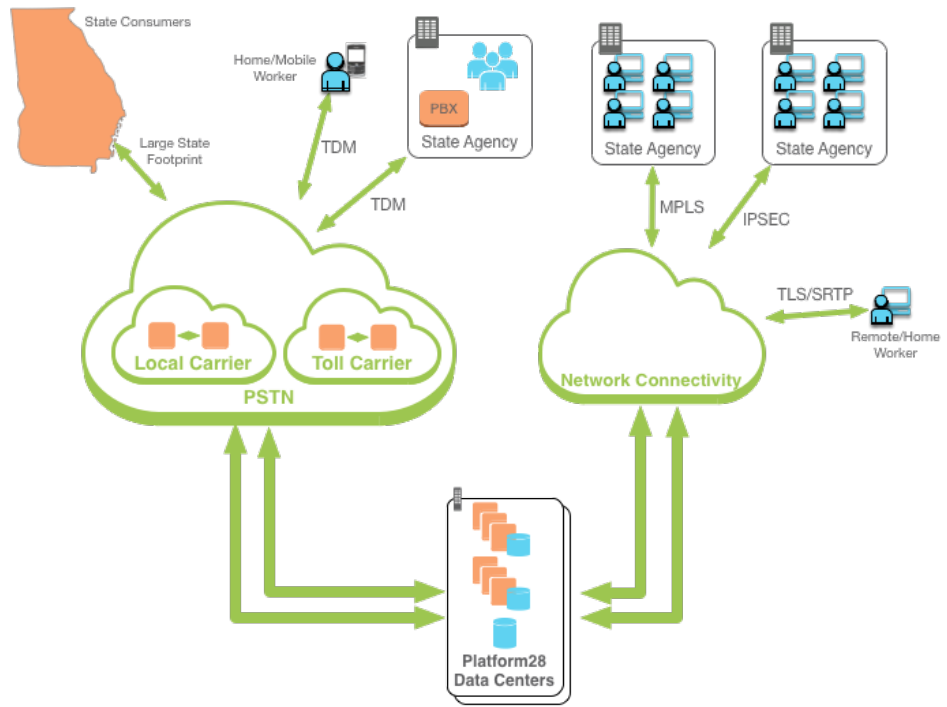
Platform28 meets this requirement.

Description: Platform28’s voice encryption capabilities meet or exceed IRS Publication 1075 as they pertain to VoIP calls.

Please see 6.2.1, immediately above for further details regarding VoIP encryption.

Provided below is a topology of the way that Platform28 can encrypt voice and data directly to the Agent Desktop via multiple kinds of network connectivity:

# Georgia Technology Authority



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## 1.0 General Description

This Exhibit provides an overview of the Contact Center services requirements. The purpose of the document is to provide a perspective of the products, services, equipment, software and support that are included within the scope of the **Exhibit 2 Statement of Work**. It is not intended that the contents be inclusive of all aspects of the environment.

## 2.0 Additional Technical Scope

### 2.1 Fully Integrated Solution

The Service Provider's responsibilities include and Service Provider shall do the following:

Describe how your solution is fully integrated, coupled or separated to deliver ACD routing, IVR and QM key components.

Platform28 uses its own telecommunications platform, written from the ground up to be a complete Communications Service Creation Environment. This system has been deployed and in operation at Tier 1 carriers and service providers since 2001. The system provides an underlying 'platform' within which multiple services are available. For instance, the system has been deployed for services ranging for Contact Center, Network Call Routing, IVR, Operator Services, Unified Messaging, CALEA, Credit/Debit Card Calling, Wholesale and Long Distance Voice, and more.

The core platform provides all functions from database services, to text-to-speech conversion. Different call flows can be written to take advantage of part or all of the platform's capabilities.

All incoming calls to the system, whether voice, email or other, are controlled centrally by our "Interaction Routing Engine", which determines where and how the interaction must be handled. For instance, if it requires IVR services, a media server is attached and it executes actions that are determined by the routing engine. When the IVR interaction is completed, the call is then handed off to the appropriate component, still under the control of the routing engine. We do not have external IVR systems which are hair-pinning the call, so capacity is not a concern for Platform28.

The "ACD" functionality is simple one component of the routing engine, and using voice prompts during a contact center interaction does not require that the call be routed out of the ACD into an IVR, etc.

Recording and Scorecarding are also integrated features of our system. The recordings are captured by the media servers as voice passes through them. These recordings are then uploaded into a central sever for easier access, and tagged in our databases. Then, using our web based admin interfaces, anyone who has access can listen to and perform score-carding. Similarly, live-monitoring is accomplished under the control of our routing engine, and executed at the voice-gateway level.

Platform28 has built in reporting and dashboarding features. These again, are not external systems but integral parts of our platform.

## **2.2 Telephony Delivery Design & Capacity**

The Service Provider's responsibilities include and Service Provider shall do the following:

- 2.2.1 Describe how your proposed solution will manage and deliver capacity for telecom trunking services as in TDM, SIP, Data, Toll Free for the anticipated volume in support of the contact centers.

Platform28 supports 150,000 active daily users and nearly 600,000,000 interactions monthly. The Platform28 network includes massively scaled TDM and VoIP trunks that have over-provisioned capacity ranging from 2x to 10X across each of the redundant telco providers. In addition, Platform28 only selects telco providers that have a minimum of two active, redundant switches, ensuring continuity within and between all providers in Platform28's network.

The methodology for the design of Platform28 network of data centers and telco trunking ensures that no inbound calls are blocked or receive a busy signal, regardless of significant peaks in call volume that may occur.

When provisioning TDM circuits, Platform28 ensures that the trunks are not utilized greater than 70% or available resources during the maximum busy hours. Platform28 provisions cross-connects for carrier access that provide scaling without having to order additional connections from the carriers, that way trunking can be expanded by turning up additional spans without the need for additional equipment or new agreements with carriers.

When ordering SIP services from carriers, Platform28 only uses carriers that do not limit the number of concurrent voice channels. However, if requested, Platform28 can optionally choose to limit the number or channels used by any one of its customers, if required. These SIP trunks are utilized for both local and Toll Free origination and termination. The only limitation on SIP trunking is the size of the data network.

Platform28 sizes its data network connections so that only 20% of the available bandwidth is utilized during the 95% busiest hour.

As Platform28 telecom engineers adhere to the standards for trunking and network design identified above, with TDM, SIP, and data networks provisioned to always be

underutilized, Platform28 consistently handles significant unforeseen traffic spikes without issue.

In addition, Platform28 regularly works with customers, and will work with GTA and the Agency customers, as needed, to provide a comprehensive analysis of inbound trunks, data connectivity, local PSTN services, and other telecom and data services. The analysis uses best-in-class practices for sizing circuits, including the use of Erlang (traditional, or modified) analysis, where appropriate. This analysis results in suggested configuration and sizing of inbound and outbound trunks, data connectivity, local PSTN services and other telecom and data services. Furthermore, Platform28 will continually provide analysis updates, as appropriate to ensure that GTA and Agency Customers will have adequate telecom trunks, data pipes and services to meet their capacity requirements. This analysis update will be done at least once per quarter, or at any point when there is a significant change in call patterns, staffing or other factor that may affect capacity.

Platform28 has extensive experience with data and telecommunications networks, including the requisite monitoring and on-going administration. Platform28's Network Management systems continually monitor all voice and data circuits for capacity, usage, quality, and service availability. In addition, Platform28's voice network monitoring systems are capable of providing MOS scores on all calls, to qualitatively measure voice quality.

Information collected by the Network Management System is fed into the metrics system, and is available for BI dashboarding and reporting purposes. Platform28 can, as part of initial setup, configure Dashboards that reflect near real-time information on trunk utilization, data network utilization, voice quality, etc. These can be customized per Agency Customer, if required so that individual Agencies can see their usage of the system.

In addition, Platform28 has developed its own Agent Desktop with integrated SIP soft phone. The soft phone includes tools to evaluate jitter, latency, and echo, and to provide those tools for centralized evaluation and diagnosis. In addition, the Agent Desktop Agent Statistics and Analytics display allows agents to locally view the quality of their voice quality. If a constituent indicates they're having trouble hearing an agent the agent can instantly understand whether the issue is most likely happening locally or on the constituent's end.

GTA and Agency Customers may access Platform28's extensive BI interfaces to have visibility into trunk utilization at any point in time.

## **2.3 Security for Protected Voice/Data for compliance**

The Service Provider's responsibilities include and Service Provider shall do the following:

### **2.3.1 Describe how your service protects the at-risk data when traversing the voice network to the remote, at home agents**

Platform28 uses encryption and tokenization in ways that have allowed the company to be a leader in delivering data security and data integrity. The way we deliver security features is substantially different than other companies on the market.

Data Integrity - Platform28 uses a horizontally scaling, geographically distributed database that ensures the integrity of all data residing within the system. The database itself is sharded across all infrastructure within each data center, ensuring replication and dramatically improving performance over traditional data environments. As the amount of data residing within the Platform28 ecosystem increases, the system automatically scales out the database across additional service capacity, as needed.

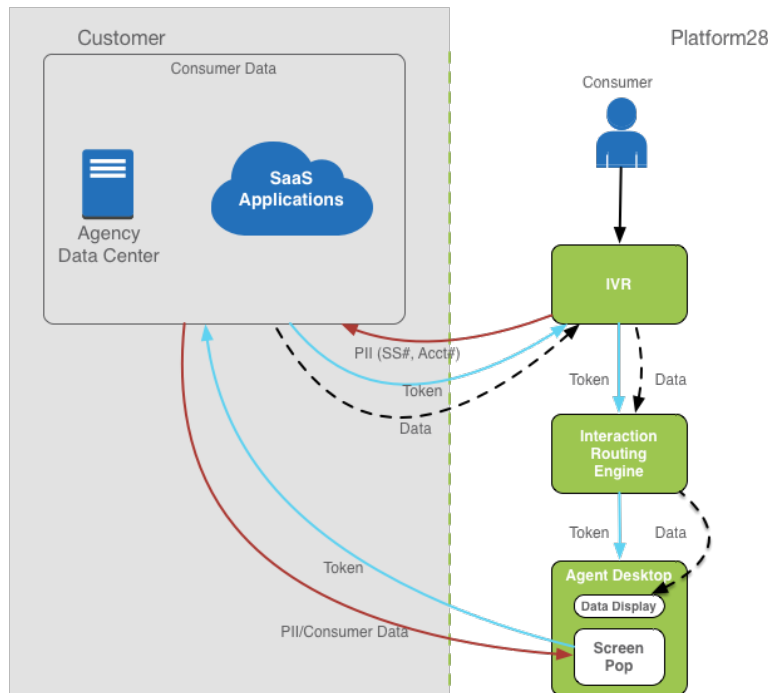
Data Encryption within the Database - The database Platform28 uses the highest levels of database encryption, including complete database-level and wire level encryption of data.

Data Separation - Platform28 also uses a unique method of tokenization that allows for complete data separation and ensures that no PII, PHI, or other sensitive data is ever written to any Platform28 infrastructure. Displayed in the call flow below, data separation uses a web service connection to the customer's data repository (CRM, ERP, ticketing system, etc.). Constituent information is captured in the IVR and kept in-memory while it's passed to the customer's data source. The data source passes back a unique token and constituent information without sensitive data, which is then used to route the call/interaction appropriately. Platform28 then pops the customer's CRM system that displays sensitive data. The token is used to send data back to the customer's data source for aggregated reporting or used within Platform28's BI and reporting tools.

This methodology has allowed Platform28 to provide HCC services in highly regulated environments by introducing a method of interaction management that keeps hands completely off of sensitive data. This is a differentiator and ensures a much easier process of incorporating new systems into customers for whom security is a priority.

Provided below is a representation of the way that Platform28 can use encryption or tokenization to ensure to deliver the highest level of data integrity:



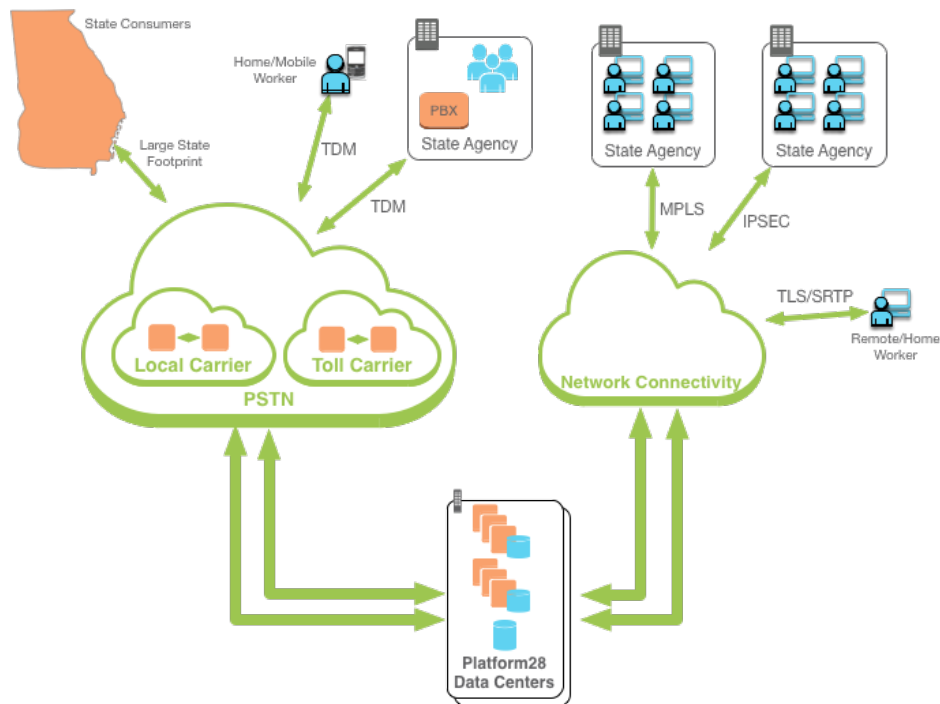


Data Encryption Between Platform28 and Agents – Platform28 manages encryption of both voice and data across the network from the HCC to Agents in several ways.

As detailed in the topology presented in the question below, Platform28 can provide services to agents at offices using the current managed MPLS connection, using the native encryption of that network connection. If Agencies choose for Platform28 to provision new MPLS connections, Platform28 can deliver identical encryption. If Agencies require connecting via a regular broadband connection, Platform28 will encrypt all traffic using IP/SEC. Finally, when connecting directly the Agent Desktop for remote/home-based agents using broadband connections, Platform28 encrypts *both* voice *and* data using TLS/SRTP. This is possible because Platform28 developed its own Agent Desktop with integrated soft phone for greater security and significantly more granular administration and logging.

Note, variations of all of these security and encryption methods are available, based on customer requirements.

Provided below is a topology of the way that Platform28 can encrypt voice and data directly to the Agent Desktop via multiple kinds of network connectivity:



Platform28’s voice encryption capabilities meet or exceed IRS Publication 1075 as they pertain to VoIP calls.

## 2.4 Segmentation of Agency Contact Centers within Multi-Tenant Solution

The Service Provider’s responsibilities include and Service Provider shall do the following:

**2.4.1** Describe how your proposed solution will ensure State contact centers will not impose performance of other agencies during unexpected surge events.

Platform28's distributed processing architecture uses a horizontally scaled infrastructure, which allows the system to grow dynamically as capacity is needed. This applies to all components of the system, from voice gateways, media servers, REST and web servers, applications servers, and even the database. Our horizontally scaled database is one of Platform28's unique capabilities. This alleviates the need for individual database servers per tenant as some of our competitors require. It also means that if a Platform28 tenant grows or uses more capacity, they will not "outgrow" their partition or need to be moved to new servers.

In addition, Platform28 oversubscribes capacity on all our trunks, whether it be LAN, WAN, Data Interconnects or Telco Carrier Interconnects. We generally size to use only 20% of our trunk capacity at 95% of the time, allowing our customers to jump up by several factors in volume with no impact on the voice quality or capacity for themselves or any of our other tenants.

To further clarify, Platform28 delivers a cloud-scale infrastructure similar to Amazon, Facebook and others, using the most up-to-date design to manage fully elastic usage. Providers that suggest that separate infrastructure per tenant to create a more resilient environment are using dated, vertically scaled technology. That methodology severely limits the vendor's ability to scale or be real-time geo-diverse, limiting the total level of availability. Platform28 focuses on providing "Always On" services.

## **2.5 Proposed Failover Design and Supporting Service Level Agreement**

The Service Provider's responsibilities include and Service Provider shall do the following:

- 2.5.1 Please describe in detail your failover design in support of your proposed uptime SLAs. (How many 9s in support of the solution as a whole and/or for specific components)

Platform28's cloud services are offered on a system that has been purpose built to operate in a 'carrier grade', 100% availability mode, while processing the most demanding workloads. Platform28 has further enhanced the system to provide "Continuous Availability" (Always On) service. This is a crucial differentiator, and important for clients who "always" need the service to be up, even in the case of disasters, rather than waiting hours or days to be moved to backup sites.

Platform28 uses a horizontally scalable architecture spread across all components of the system, with multiple geographically diverse data centers to ensure that services are always available. Within each data center there are multiple layers of redundancy to prevent loss of service due to server or software failures. The horizontally scalable architecture means that service nodes can be added or removed while the system is still running, ensuring that Platform28 can scale up, as needed, to easily meet increased client demands. (This architecture also means that not only does Platform28 provide an unscheduled downtime limit guarantee, we also allow our customers to avoid scheduled downtime, something that is often the source of regular, often daily, outages.)

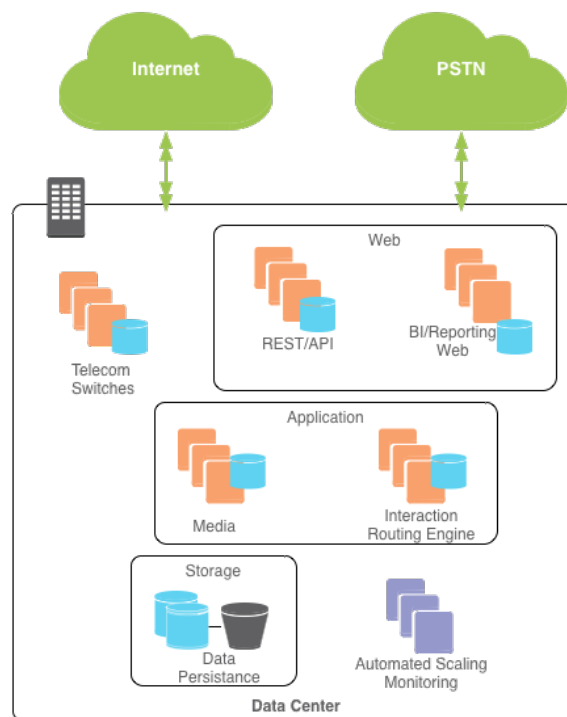
Platform28 maintains multiple redundant PSTN, VoIP and data network connections to provide redundancy at the voice, data and Internet connectivity layers. Client connectivity can also be configured with redundant layers to ensure that dedicated connections, such as point-to-point circuits, or MPLS circuits, are resilient as well.

Platform28 is architected in a manner that, should an event occur that disables an entire data center, the Agent Desktops and Business soft-phones connected to servers at the failed data center will re-register to servers at other data centers, and services will be immediately available again. Incoming PSTN/VoIP connections run in a distributed mode across multiple data centers to ensure that failure of a data center will not prevent incoming calls from being processed.

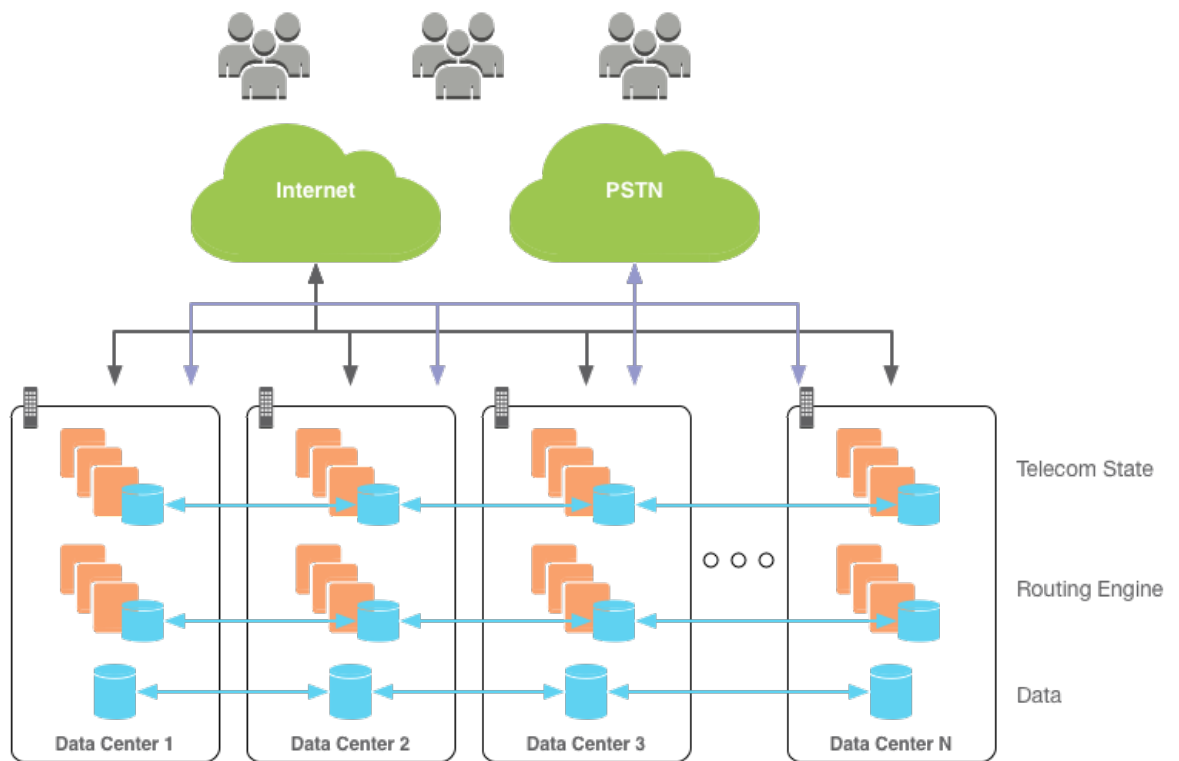
Platform28 regularly provides network design and testing resources to ensure that customer premises are optimized for redundancy.

The architecture behind Platform28 ensures resiliency throughout our entire network. As noted, this architecture is significantly different than other hosted contact center providers and has distinguished Platform28. Most cloud-based contact center solutions were developed in one of two ways: 1) Using open source Asterisk technology which has severe limitations because they rely on active/standby systems, creating significant opportunities for outages or, 2) Using traditional premise-based equipment that the provider hosts from a data center which often require planned downtime for updates, have the same vulnerabilities to outages due to failure of individual pieces as traditional premise-based systems, and which do not rely on databases that sync between locations, thereby forcing customers to experience significant downtime should a disaster occur while data is moved between centers.

Provided below is a diagram of Platform28 resiliency within one of its data centers:



Provided below is a diagram of Platform28 resiliency between data centers:



## Service Charges

Ref ID	Service Charge	Unit of Measure	Recurring Period	Charge
1	HCC Agent Seat	single named agent	monthly	\$50.00
2	HCC Agent Seat with bundled one time professional services (alternative - If professional services are required)	single named agent	monthly	TBD (Based on scope of work)
3	HCC Quality Management Seat	single named agent	monthly	Included with HCC Agent Seat
4	HCC Work Force Management - Basic (optional)	single named agent	monthly	\$10.00
5	HCC Work Force Management - Enhanced (optional)	single named agent	monthly	\$20.00
6	HCC Work Force Management - SCO (optional)	single named agent	monthly	\$10.00
7	HCC Toll Free Services	per minute	monthly	\$0.015
8	HCC Toll Free Service Bucket of 10,000 minutes (optional - customer may purchase advance minutes at a discount)	per 10,000 minutes	monthly	\$140.00
9	Toll Free DID	per number	monthly	\$0.00
10	HCC Local DID Services	per minute	monthly	\$0.005
11	Local DID (alternative to HCC Toll free services)	per number	monthly	\$0.00
12	HPBX Seat (One DID) (optional)	each	monthly	\$15.00
13	E911 (only required for Local DID 's displayed in caller ID	each	monthly	\$1.00
14	Other phones may be available upon request	per minute	monthly	\$0.010
15	HCC Fax DID	each	monthly	\$0.00
16	Network Connectivity	per circuit	monthly	If requested and TBD (based on requirements for location)
17	Platform28 Softphone Client	per unit	monthly	\$0.00
18	Platform28 Agent Desktop Client	per unit	monthly	\$0.00
19	VoIP Adapter (IAD) Grandstream HT502 (optional)	per unit	monthly	\$1.02
20	Polycom Soundpoint IP 321 PoE Desk Phone (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$2.54
21	Polycom Soundpoint IP 331 PoE Desk Phone (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$3.69
22	Polycom Soundpoint IP 335 PoE Desk Phone (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$4.30
23	Polycom Soundpoint IP 450 PoE Desk Phone (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$5.89
24	Polycom Soundpoint IP 550 PoE Desk Phone (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$6.20
25	Polycom Soundpoint IP 650 PoE Desk Phone (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$7.75
26	Polycom Soundpoint IP Expansion Module (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$5.43
27	Polycom Soundstation IP 5000 Conference Phone (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$10.85
28	Polycom Soundstation IP 6000 Conference Phone (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$13.95
29	Polycom Soundstation IP 7000 Conference Phone (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$17.05
30	Polycom PV2460 120V Generic Power Supply (optional) (Option to purchase under Equipment Charges)	per unit	monthly	\$0.43

Other phones may be available upon request

### One-Time Charges

Ref ID	Service Charge	Unit of Measure	Recurring Period	Charge
1	HCC Implementation per seat	per seat	one-time	\$0.00
2	HCC Implementation per Contact Center	per HCC	one-time	\$0.00
3	Shipping and handling	per shipment	one-time	Cost (no markup)

Other phones may be available upon request

### Rate Card Charges

Ref ID	Rate Card Charge	Charge per hour	Charge per week	Charge per month
1	Contact Center Consultant	\$150.00	\$5,700.00	\$22,800.00
2	Professional Trainer	\$50.00	\$1,900.00	\$7,600.00
3	Project Manager	\$50.00	\$1,900.00	\$7,600.00
4	Work Force Management Consultant	\$100.00	\$3,800.00	\$15,200.00
5	Professional Services - Networking	\$150.00	\$5,700.00	\$22,800.00
6	Professional Services - Software Integration	\$170.00	\$6,460.00	\$25,840.00

Other phones may be available upon request



## Equipment Charges

Ref ID	Service Charge	Unit of Measure	Price	Maintenance	Maintenance Period
1	VoIP Adapater (IAD) Grandstream HT502 (optional)	each	\$33.00	\$0.00	N/A
2	Polycom Soundpoint IP 321 PoE Desk Phone (optional) (option to lease under service charges)	each	\$82.00	\$0.00	N/A
3	Polycom Soundpoint IP 331 PoE Desk Phone (optional) (option to lease under service charges)	each	\$119.00	\$0.00	N/A
4	Polycom Soundpoint IP 335 PoE Desk Phone (optional) (option to lease under service charges)	each	\$122.00	\$0.00	N/A
5	Polycom Soundpoint IP 450 PoE Desk Phone (optional) (option to lease under service charges)	each	\$190.00	\$0.00	N/A
6	Polycom Soundpoint IP 550 PoE Desk Phone (optional) (option to lease under service charges)	each	\$200.00	\$0.00	N/A
7	Polycom Soundpoint IP 650 PoE Desk Phone (optional) (option to lease under service charges)	each	\$250.00	\$0.00	N/A
8	Polycom Soundpoint IP Expansion Module (optional) (option to lease under service charges)	each	\$175.00	\$0.00	N/A
9	Polycom Soundstation IP 5000 Conference Phone (optional) (option to lease under service charges)	each	\$350.00	\$0.00	N/A
10	Polycom Soundstation IP 6000 Conference Phone (optional) (option to lease under service charges)	each	\$450.00	\$0.00	N/A
11	Polycom Soundstation IP 7000 Conference Phone (optional) (option to lease under service charges)	each	\$550.00	\$0.00	N/A
12	Polycom PV2460 120V Generic Power Supply (optional) If required for the Polycom Phones (option to lease under service charges)	each	\$14.00	\$0.00	N/A

Other phones may be available upon request

## Service Provider Pricing Assumptions

Service Provider will provide all assumptions used in pricing the Services, notating those assumptions which impact price.

Ref ID	Price Impact (Y/N)	Description
1	Y	Network and hardware configurations complies with Platform28 requirements. Initial configuration, moves, adds and changed are included in HCC per seat price. Integration with thrid party software requires professional services and will be build seperatly. See Rate Card for proffessional services cost.
2	Y	Any professional services required could be included in the first 12 months of the per seat price. Amount TBD per RFQ.
3	N	Included in per seat price
4	T	n/a
5	N	n/a
6	N	n/a
7	Y	Domestic Only. Intenational calling will billed at a per country rate. Rates availalbe upon request.
8	N	Domestic Only.
9	N	Toll Free DID
10	N	HC Local DID Services
11	N	n/a
12	N	n/a
13	N	n/a
14	Other phon	n/a
15	Y	HPBX can be used with our free soft phone. If a desk phone is required it can be purchased or leased on a monthly basis.
16	Y	If customer needs additional network connectivity to a contact center Platform28 help with sizing and procuring the circuit.
19-29	Y	<p><b>Lost or Damaged Leased Phones</b></p> <p>The customer is responsible for leased telephones that are lost or damaged. Platform28 will replace lost or damaged telephones and assess a replacement fee equal the value of the lost or damaged telephone.</p> <p><b>Telephone Moves</b></p> <p>Moving a desk telephone requires a Service Order to be placed. This is required for VoIP telephones in order to comply with e911 regulations ensuring emergency responders will arrive at the correct location when someone calls 911 from a particular telephone. There is no fee associated with moving a VoIP telephone, however there will be a \$100 fee assessed if you move a VoIP telephone without placing a service order.</p>

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## 1.0 Service Charges

Service charges are those that the GTA Customer can expect to incur on a recurring basis (usually monthly) as part of receiving the services from the Service Provider (e.g. agent seat).

ID	Name of Charge	Description of Entitlement
1	<i>HCC Agent Seat</i>	Agent Call Delivery, Routing and Management, as detailed in HCC RFP response attachment 2C.
2	<i>HCC Agent Seat with professional service</i>	Agent Call Delivery, Routing and Management with professional services, as detailed in HCC RFP response attachment 2C.
3	<i>HCC Quality Management Seat</i>	Included with HCC Agent seat. Agent Quality Monitoring, recording and reporting, as detailed in HCC RFP response attachment 2C.
4	<i>HCC Work Force Management - Basic (optional)</i>	Workload Tracking, Scheduling, Forecasting and Adherence, as detailed in HCC RFP response attachment 2C.
5	<i>HCC Work Force Management - Enhanced (optional and alternative Basic and SCO WFM)</i>	Workload Tracking, Scheduling, Forecasting and Adherence, as detailed in HCC RFP response attachment 2C.
6	<i>HCC Work Force Management - SCO (optional and alternative to Basic and Enhanced WFM)</i>	Workload Tracking, Scheduling, Forecasting and Adherence, as detailed in HCC RFP response attachment 2C.
7	<i>HCC Toll Free Services</i>	Cost per minute of usage for toll free service.
8	<i>HCC Toll Free Service Block of 10,000 minutes (optional - customer may purchase blocks of 10,000 minutes at a discount)</i>	Cost per block of 10,000 minutes for toll free service. Must be used within one billing period. Excess minutes are billed at the HCC Toll Free Service per minute rate.
9	<i>Toll Free DID</i>	Toll free number.
10	<i>HCC Local DID Services</i>	Local DID pointed to the HCC – Cost per minute
11	<i>Local DID (alternative to HCC Toll free services)</i>	Cost per minute of usage for local DID service.
12	<i>Hosted PBX Seat (One DID) (optional)</i>	One hosted VoIP PBX seat, free soft phone included.
13	<i>E911 (only required for Local DID's displayed in caller ID)</i>	
14	<i>Dometic Long Distance</i>	Cost per minute for domestic long distance

15	<i>HCC EFax DID</i>	Cost for an EFax DID
16	<i>Network Connectivity</i>	If requested and TBD (based on requirements for location)
17	<i>Platform28 Softphone Client</i>	Included VoIP Soft phone , as detailed in HCC RFP response attachment 2C.
18	<i>Platform28 Agent Desktop Client</i>	Include Agent desktop , as detailed in HCC RFP response attachment 2C.
19	<i>VoIP Adapater (IAD) Grandstream HT502 (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
20	<i>Polycom Soundpoint IP 321 PoE Desk Phone (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
21	<i>Polycom Soundpoint IP 331 PoE Desk Phone (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
22	<i>Polycom Soundpoint IP 335 PoE Desk Phone (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
23	<i>Polycom Soundpoint IP 450 PoE Desk Phone (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
24	<i>Polycom Soundpoint IP 550 PoE Desk Phone (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
25	<i>Polycom Soundpoint IP 650 PoE Desk Phone (optional)(Option to</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
26	<i>Polycom Soundpoint IP Expansion Module (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
27	<i>Polycom Soundstation IP 5000 Conference Phone (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
28	<i>Polycom Soundstation IP 6000 Conference Phone (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
29	<i>Polycom Soundstation IP 7000 Conference Phone (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges
30	<i>Polycom PV2460 120V Generic Power Supply (optional)</i>	Lease Option for optional equipment available to purchase, listed in 4-A Pricing, Tab 4 – Equipment Charges

## 2.0 One-Time Charges

One-time charges are those that the GTA Customer can expect to incur only once, maybe as part of implementing the Services or as part of a change in Services (e.g. implementation charge). The table below should list all the one-time charges that GTA Customers may incur and describe the outcome they may expect as a result of each of those charges.

ID	Name of One-Time Charge	Description of Outcome
1	HCC Implementation per seat	Define the agent's role and success criteria, configure the agent, validate, deploy, and tune.
2	HCC Implementation per Contact Center	Define the business goals and success criteria, configure the solution, train staff on configuration and operation, validate that the solution meets requirements, deploy and tune.
3	Shipping and Handling	If ever required pass through only.
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### 3.0 Rate Card Charges

Rate Card charges are costs for professional services. GTA expects that in most cases no professional services will be required for the use of the Services, and as such the use of these professional services should be seen as entirely optional. The professional services detailed below must be associated with the delivery of the Services; general professional services (e.g. project management) may not be supplied under any agreement that may be awarded as an outcome of this RFP.

ID	Professional Service	Description of Professional Service
1	<i>Contact Center Consultant</i>	Establish processes that meet business objectives while optimizing use of available people and technology. Access and aid in planning multi-channel strategy, multisite strategy, metrics strategy, business continuity planning, and financial analyses.
2	<i>Professional Trainer</i>	Develop and deliver training in contact center technology.
3	<i>Project Manager</i>	Provide project management and/or subject matter expertise to implement new centers, changes to existing ones, and transitions to new service models.
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## 4.0 Equipment Charges

GTA assumes and desires a solution where all equipment, software, licenses and materials are included in the Services. However, if there is optional equipment that the Service Provider would like to highlight for GTA Customer potential use, that equipment should be identified here.

ID	Name of Equipment Charge	Description
1	Polycom Soundpoint IP 321 PoE Desk Phone (option to lease under service charges)	Up to 2 lines, full-duplex speakerphone
2	Polycom Soundpoint IP 331 PoE Desk Phone (option to lease under service charges)	Up to 2 lines, full-duplex speakerphone, 2 10/100 Mbps switched Ethernet ports
3	Polycom Soundpoint IP 335 PoE Desk Phone (option to lease under service charges)	Up to 2 lines, full-duplex speakerphone, 2 10/100 Mbps switched Ethernet ports, HD Voice
4	Polycom Soundpoint IP 450 PoE Desk Phone (option to lease under service charges)	Up to 3 lines, full-duplex speakerphone, 2 10/100 Mbps switched Ethernet ports, HD Voice
5	Polycom Soundpoint IP 550 PoE Desk Phone (option to lease under service charges)	Up to 4 lines, full-duplex speakerphone, 2 10/100 Mbps switched Ethernet ports, HD Voice
6	Polycom Soundpoint IP 650 PoE Desk Phone (option to lease under service charges)	Up to 6 lines, full-duplex speakerphone, 2 10/100 Mbps switched Ethernet ports, HD Voice
7	Polycom Soundpoint IP Expansion Module (option to lease under service charges)	Compatible with the Polycom IP 650. For telephone attendants–receptionists, administrative assistants, secretaries, and other “power users” who manage and monitor multiple simultaneous telephone calls on a daily basis
8	Polycom Soundstation IP 5000 Conference Phone (option to lease under service charges)	Advanced IP conference phone for small conference rooms, microphone picks up voice up to seven feet away
9	Polycom Soundstation IP 6000 Conference Phone (option to lease under service charges)	Advanced IP conference phone for small to mid size conference rooms, microphone picks up voice up to twelve feet away
10	Polycom Soundstation IP 7000 Conference Phone (option to lease under service charges)	Advanced IP conference phone for small to mid size conference rooms, 20 ft. microphone pickup, and even more with optional expansion microphones or multi-unit connectivity, reaching all corners of the room.
	Polycom PV2460 120V Generic Power Supply (option to lease under service charges)	Required to power Polycom Phones if POE is not available