UCAAS Project - Request for Proposal

Customer Name:

Date:

CUSTOMER NAME is soliciting proposals for a hosted unified communications / UCAAS solution to replace legacy pbx infrastructure throughout all of our offices and branch locations. Please provide all requested information below. The proposals must be submitted either in person or electronically by THIS DATE. Proposals received after the specified time will not be considered.

The proposal must be signed by and individual who has full authority from the proposer to enter into a binding agreement on behalf of the proposer. All proposals should be delivered to EMAIL ADDRESS or in person at PHYSICAL ADDRESS.

***Corporate Information:***

* Please include a copy of most recent audited financial statements.
* If publicly traded, please list stock symbol:
* State of Incorporation:
* Parent company (if applicable):
* Date of incorporation:
* 2015 Revenue:
* 2015 Expenses:
* Long Term Debt:
* 2015 R&D Spend:
* Major ownership stakeholders and percentages:
* Locations:
* Total Number of Full Time Employees:
	+ Engineering:
	+ Support:
	+ Customer Service:
	+ Training:
	+ Project Management:
	+ R&D:
	+ Admin:
	+ Sales:
* Average customer size:
* Largest customer: (please list company name and description)
* List 5 customers of similar size to our organization:
1. Company name:

 Address:

 Contact name, phone number, email address:

 Description (number of endpoints deployed, date installed, etc.):

1. Company name:

 Address:

 Contact name, phone number, email address:

 Description (number of endpoints deployed, date installed, etc.):

1. Company name:

 Address:

 Contact name, phone number, email address:

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 Description (number of endpoints deployed, date installed, etc.):

***Support:***

* Please describe escalation procedures:
* How do customers contact support?
* Is support ever outsourced?
* What are the hours for support?
* How many support staff are available after hours?
* Are there any additional charges for calling into support?
* How often do you release a software update? Is service impacted during the update?
* Please include detailed Service Level Agreement to include the following:
	+ Uptime
	+ MOS
	+ Resolution target time
	+ Escalation process and timeframes
	+ Consequences for service provider for SLA violations

***Technical Information:***

* How many data centers:
* D.C. locations:
* Describe Redundancy and Failover:
* Security and Compliancy: List compliancy standards your solution adheres to: (e.g. HIPAA, ITAR, PCI)
* Do you white-label / private label your technology?
	+ If so, is it BroadSoft, asterisk, MetaSwitch, or other?
	+ If white-labeled, is the platform owned and operated by you? Or is it supported by a third party?
* Documented uptime over past 5 years:
* Have you had any customer affecting outages in the past 3 years? If so, please describe steps taken to resolve issues.
* Please describe what makes your company different than other providers in this space:
* How do customers connect to your platform?
* If an MPLS is in place, can customers connect into one or multiple data centers?
* If connecting over the top of internet connections at each location, what steps do you take to ensure high quality voice?
* Do you have NNIs with multiple carriers? If so, please list:

***Feature / Functionality:***

* List different profile types and prices with detailed descriptions to include the following:
	+ Mobility application
	+ Desktop or browser based softphone and UC application
	+ Unified communications tools
	+ Outbound usage
	+ Inbound toll free rates
	+ Fax to email
	+ Audio conferencing
	+ Web collaboration / video conferencing

***Implementation and Project Management:***

* Describe project management methodology:
* Who is responsible for installation of IP phones? Are there costs associated with this?
* What tools are used for project management?
* Please include a project plan for this project including estimated timeframes:
* Please describe members of project team:
* Describe costs associated with implementation:
* Describe training plan. Onsite or remote. Are there costs associated with this?