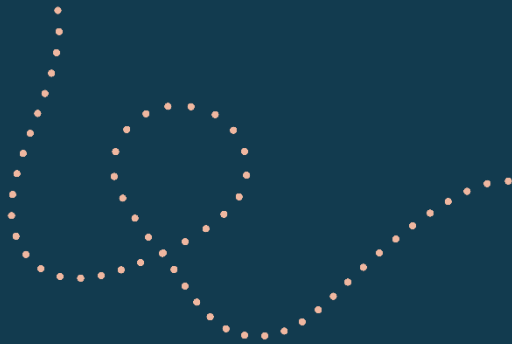




Helping  
businesses  
go further

# Commercial in Confidence



**TENDER  
SPECIFICATION:  
Cloud based  
integrated  
telephony  
platform**

**Date - 6<sup>th</sup> february 2024**

**Prepared by:**

Karl Shires – Senior Project Manager, Virtual Services

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# 1. NOTICE OF TENDER

**Project Name:** Cloud Based Integrated Telephony Platform  
**Project Location:** Belmont, Durham

Bids must be received prior to: 23<sup>rd</sup> Feb 2024

**Submission:** Via email to – [facilities@weareumi.co.uk](mailto:facilities@weareumi.co.uk)

## 2. ABOUT UMi

<https://www.weareumi.co.uk/>

Established in 2007 and a wholly employee-owned business, operating across the UK.

We're on a mission to make it easier for businesses to do more and go further by taking the hard work out of finding and using the best information, expertise, and finance. We believe that businesses have the power to make a difference and by working together we can collectively achieve more than we could alone. This tender opportunity is a great example of that as we look for a partner to support our ability to deliver business support services for our partners to help business owners get the help and support needed to develop their business. Our partners include central government departments, devolved administrations, mayoral combined authorities, local authorities, charities/philanthropic funders, and businesses. Our customers are sole traders, charities and business owners/leaders who want to use our services to help find out the information, expertise and finance needed to help them do more and go further.

## 3. BACKGROUND

UMi exists to make it easy for businesses to find the best information, expertise, and finance. Therefore, it is essential that our services can be delivered easily, professionally and intuitively for both the UMi team, UMi's partners and its customers. We currently deliver a number of services targeted at individuals running businesses, charities or thinking of starting a business involving multichannel inbound and outbound across phone, webchat, email, SMS and various messaging services. We operate during core business hours, Monday to Friday, but are increasingly exploring solutions to enable our customers to self-serve outside of these hours, perhaps via chat bot. There are times, because we deliver for central government that we may experience large and unexpected spikes in inbound traffic or are required to scale up, so the ability to handle these scenarios are a must. Some of the services we deliver will multiyear, whilst others might be for just 6 months, so simple self-administration of spinning up new phone lines for these services is also a must.

We need robust tried and tested solutions and will not consider technologies that are novel and relatively new to market as we need to be certain that the service is stable and proven to be capable.

As stated in our introduction, UMi believes business has the power to make a positive difference in the world in which we live. It is essential therefore that the partner we select is committed to behaving responsibly. At UMi we measure that by not only our environmental impact but commitment to initiatives such as the real living wage, supplier payment terms etc. We will be looking for a partner who has a similar ethos and ability to demonstrate how they put that into practice.

## 4.SPECIFICATION

We require a cloud-based contact centre solution that will provide flexibility, excellent customer service and full support. There should be no requirement to add software locally to any individual user or, if changes are required should be able to be done through a group policy.

The system will be able to be fully integrated with Microsoft Dynamics 365 and provide data that can be easily provided in a format that can be accessed by Microsoft Power BI and data used in secondary dashboards and not just dashboards specific to the telephony, for example dashboards our partners might access providing general information about the service we deliver for them, of which telephony is only a component.

The system should be multi-channel and include (as a minimum) with transactions being written back to Dynamics and ideally look up contact record from Dynamics. (please note this includes from different applications linked to different services delivered developed within Dynamics).

- Integrated telephony platform
- Webchat functionality
- SMS Text
- Social media messaging integration

or the system should be capable of integrating with other webchat, SMS text or social media messaging systems (See additional requirements below)

The basic system requirements must include the following attributes:

- The ability to hold 1,000 calls in a queuing system without receiving a busy tone, with the opportunity to scale to 30,000 at short notice. Please indicate what that time period for mobilisation would be?
- A multi-level IVR system that can be easily changed and created in-house by local system administrators.
- The ability to include high quality recorded messages in the IVR that are multi format e.g. wav, MP4.
- Voice mail facilities, both on an out of hours service and during busy periods. The system must allow a voicemail to be left whilst in a call queue, or, if the customer chooses to wait, it will not reset their position in the call queue. The voicemails should be able to be directed to named inboxes.
- The ability to add into the IVR/call queue the ability to request a call back.
- The ability to purchase additional licenses at short notice for limited periods of time (ideally on a rolling month basis). Licenses should be deployable in no more than 48 hours.
- The ability to add new team members locally, within 24 hours of a licence being issued. We will also require the ability to remove a user's access with immediate effect if required.

- The ability to create, amend and manage multiple hunt groups locally, to support multiple contracts.
- The ability to purchase new telephone numbers including local numbers, 0800 and 0330 numbers within 5 working days.
- Any multi factor authorisation for access to the system should ideally be app based and not require any physical token.
- Manage locally the ability to call or receive international calls
- The ability to record all calls, that can be stored for a minimum of 30 days. These calls should be able to be easily located and downloaded locally, either individually or in bulk.
- The provision of an administration portal that allows us to manage all aspects of the system including:
  - Adding, editing and removal of team members
  - Add and amend hunt groups or contracts
  - Add or amend skill sets
  - Add and amend IVR structures and ongoing journey
  - Add and amend recorded messages
  - Add or amend opening and closing times
  - Add or amend wrap time
  - Any other provision to support in the maintenance and running of the contact centre solution

Please can you indicate in your response how services are maintained in the event of any system failure. For example, if the phone line fails would SMS/Webchat continue to work?

The system should be compatible with an automated preview dialler for outbound calling. This must be able to work directly with Microsoft Dynamics 365 and have capacity to make up to 100,000 calls per annum and be deployable within a week.

No aspect of the telephony system or any of the features or functions should require the use of unsupported or end of life software, e.g. Microsoft Internet Explorer.

All data must be stored in UK based data centres.

## **Webchat**

The system should have the inclusion of an integrated Web chat function. This will allow any given adviser to access a chat queue, take multiple chats and, as a minimum, also have the following features:

- Clear notification of a new customer
- Canned responses
- Automated transcripts of every chat that can be stored for up to 30 days.
- Customisable automated responses
- Ability to add logo's etc to the chat widget
- Ability to easily embed the chat widget in 3<sup>rd</sup> party websites
- Provide a live dashboard to show customers waiting by time, those in chat by time, name of the adviser dealing with the customer, all advisers logged in etc.
- Can you please also present the options or capabilities to mobilise an AI driven chatbot that will allow us to triage customers and redirect to relevant information both during working days but also to support customers during out of hours should this be required in the future.

As with the telephony platform, we will require a full suite of reports for the Webchat that we can view by any chosen time period that show:

- Volume by contract/adviser
- Answered by vol and %
- Missed chats by vol and %
- Answered in under 15 seconds by vol and %
- Average wait time
- Longest wait time

As with the telephony data, we require the ability to download raw data to be integrated within Microsoft Dynamics 365/Power BI reporting and included in UMi's own reports.

### **Account Management**

We are looking for a provider that will be responsive and fully supportive. Our expectations include:

- Full project plan for the set-up, testing and roll out of the platform.
- Support in the design of customer journeys, reporting and any technical requirements
- On site support on the days of launch.
- Have a clear communication plan for account management and escalation of issues.
- Have a clear governance structure for regular meetings and reporting on the performance of the system
- Have a robust and clear system to log any issues with clear SLA's. This should also include clear explanations of what will happen, frequency of communication and also the inclusion of a Reason for Outage report, should there ever be one required provided within 72 hours.
- Full notification of all upcoming maintenance that may affect the running of the system.
- Any updates or changes are made out of hours.
- Full training is provided with all supporting working instructions and documentation is provided for both the administration function but also for all team members in the use of all aspects of the system.

### **Adviser requirements.**

On the telephony platform we require calls to be presented to the adviser in a timely manner to enable them to be answered in under 15 seconds (this is core contractual requirement). This transfer of call should not have any dead air in the process. There should be a clear pop-up window to notify the adviser of a call. We will also require the adviser to be able to:

- Answer the call
- Transfer the call
- Place the customer on hold
- Put call into conference

The system should allow an adviser to select from multiple status settings such as Busy, with the ability to title these to our requirements, available or logged out.

The call system must allow calls to be presented to the adviser who has been available for the longest period. Once completed the system must allow for an automatic 3-minute wrap period.

The call should be presented in a way to easily identify the contract/telephone number so that the adviser is able to quickly establish call scripts.

When an adviser is not available, the system must allow the playing of a recorded message, music and also the ability to leave a message. This must not interfere with the customers wait time and they should always retain their position in the queue. All wait time should be cumulative to allow visibility of total wait time by customer and this be reportable.

All advisers should have access to a dashboard showing the number of advisers and time in each status, call queues and wait times. All advisers should also have access to a dashboard that, in real time, shows:

- Calls offered/answered as vol and %
- Calls answered in under 15 seconds as vol and %
- Average answer time (hh:mm:ss)
- Average talk time (hh:mm:ss)
- Average time in Wrap/Extended wrap (hh:mm:ss)
- Total handle time (call + wrap) (hh:mm:ss)
- Time in each status

The adviser should be able to filter this by date. When an adviser is making an outbound call, they should be able to change the number that they are ringing from to reflect the contract they are ringing on behalf.

We would like our advisers to be able to listen to other adviser calls in a live environment, using their own laptop and no other specialist software or equipment.

Ideally, we would like the platform to allow the advisers or supervisors to be able to identify where their colleagues are logged in from, e.g. a central location or working remotely.

All of the above monitoring parameters should also be reportable for historical monitoring. We would also require the ability to extract the raw data into Power BI/Microsoft Dynamics 365 and be able to be included in UMi's own dashboards.

## **Manager Requirements**

We require a system that provides our managers with the tools to be able to react to any issues, check quality and provide all the data they need. As such they require:

- A real-time wallboard, that shows all current activity including:
  - All advisers by status
  - Ongoing calls (hh:mm:ss) inc the telephone number
  - Calls waiting (hh:mm:ss) inc the telephone number
- Total calls offered
- Total calls answered
- Number of advisers available
- Average wait time (hh:mm:ss)

- Longest wait time (hh:mm:ss)

The managers also require access to a live dashboard that allows them to see by contract or individual adviser for any given time period:

- Calls offered/answered as vol and %
- Calls answered in under 15 seconds as vol and %
- Average answer time (hh:mm:ss)
- Longest wait time (hh:mm:ss)
- Average talk time (hh:mm:ss)
- Average time in Wrap/Extended wrap (hh:mm:ss)
- Total handle time (call + wrap) (hh:mm:ss)
- Time in each status

The manager should be able to assign advisers to individual hunt groups easily, and where necessary move an adviser to multiple hunt groups.

For quality purposes, the manager needs to be able to listen to any call recording but also supervise a live call. The manager should be able to remotely access the call and be able to listen or, if necessary, take over the call.

### **Reporting requirements**

We will require, alongside any live dashboard, the ability to report on the data within the system. This should allow us to interrogate by any given timescale, by individual team, by adviser or by contract/hunt group. The reporting should be integrated within the platform as well as being able to provide access to the raw data to be incorporated within Power BI/Microsoft Dynamics and included in UMi's own reports

As a minimum the reports we require are:

- Calls offered by volume
- Breakdown of incoming volumes by month, day and 30-minute period.  
Calls answered - volume and percentage of calls offered  
Calls answered within 15 seconds - volume and percentage
- Abandoned calls - volume and percentage  
Actual talk time - hh:mm:ss
- Average talk time - hh:mm:ss
- Average wrap time (time in wrap or extended wrap) - hh:mm:ss
- Average handle time (talk time plus wrap) - hh:mm:ss
- Extended Average Handle time (talk time + wrap/extended wrap) - hh:mm:ss
- Average wait time (time from presentation to the call queue to answer by an adviser or customer leaves queue) hh:mm:ss
- Longest wait time - (time from presentation to the call queue to answer by an adviser or customer leaves queue) hh:mm:ss
- Total number of outbound calls made
- Average handle time of outbound calls hh:mm:ss
- Total time by status e.g. Available, Busy, comfort break etc.
- Where able to identify, the location of incoming calls by volume

Ideally, we would like the ability to interrogate all IVR structures, to be able to establish points of customer loss within the journey. The system must allow visibility by volume at each stage of the IVR.



## Specifications

The system should be compatible with the following Laptop specification:

Win 11 Pro, intel 15 quadcore, min 8GB RAM, and min 256GB SSD, no dedicated GPU.

The system should be compatible with all USB-A headsets.

## Additional requirements

We are looking for the system to provide the following additional facilities:

- The ability to set up and send SMS texts to customers for information and customer sentiment and Net Promoter Score. Answers should be written to Microsoft Dynamics 365 and linked to the number sent.
- The inclusion of a Natural Language Agent that can recognise basic phrases, linked to a range of locally programmed lists, that can then offer to send texts to a customer with a link to recommended information. This can be for Out of Hours service or, when required, added to an IVR.
- We would be interested to investigate the possibility of the system being fully multi-channel and therefore also allow the inclusion of Social media messaging questions from Facebook, X, and LinkedIn, within the workflow, as well as any other message system such as Whatsapp, Messenger etc.
- We would like to understand the capabilities of the system to perform speech analytics to support quality, sentiment and better understand the questions our customers are asking us to identify trends and generate insights.

## 5.KEY CONTACTS FOR Q&A

Potential partners can contact the following members of the UMi team during the formal submission period for further clarification of our requirements. There will not be time allocated in this period for general 'sales' discussions.

[karl.shires@weareumi.co.uk](mailto:karl.shires@weareumi.co.uk)

Tel: 07557 266613

[simon.goon@weareumi.co.uk](mailto:simon.goon@weareumi.co.uk)

Tel: 07769 295 161

## 6.TENDER AND MOBILISATION PROCESS

Process	Date
Closing date for the tender publication clarification questions	<b>2pm Monday 19th February 2024</b>
Submission reviews completed by UMI	<b>29th February 2024</b>
<i>Please ensure a suitable contact is available for any clarification questions</i>	
Shortlisted proposals selected and more detailed discussions held	<b>Week Commencing 4th March 2024</b>
Partner/Supplier appointed	<b>Friday 15th March 2024</b>
Go Live	<b>30th April 2024</b>

## 7.INSTRUCTION TO TENDERERS

- There is no fixed format on which proposal should be submitted. However, proposals must include the following as a minimum:
  - Background of your business and why you have the track record and experience to fulfil this requirement.
  - Background and clear explanation of the technology solution proposed and why this is the best fit against our requirements and evidence of its sustained use by other organisations with similar requirements.
  - Full breakdown of commercial terms and an overall unit cost based approach based on operational model. For example cost / agent / hour and day inclusive of all oncosts, management costs, overheads and margin. This should also clearly indicate any one-off set up costs and any recurring, e.g. monthly or annual costs.
  - A suggested method for recovery of costs if performance is not in line with expectations set out in section 4 'service specification'
  - Minimum required notice period for any change control or termination of services

- Clearly indicate the deployment time, any deployment and recurring costs and the minimum contract term for any scale up license requirements.
- Clear evidence of ability to comply with IT security and data sharing requirements. You must be at least Cyber Essentials plus and data held in ISO27001 UK based data centres.
- A mobilisation plan demonstrating:
  - how quickly the service could be mobilised initially
- Clearly state any assumptions that you have made
- Clearly state what expectations you expect of UMi during mobilisation or in routine operation.
- Contact details for two references with similar requirements

## **8.CONFIDENTIALITY AND NON-DISCLOSURE MEASURES**

All documents within or appended to this document, together with any subsequent clarification documents or correspondence are of a strictly confidential nature and will remain the property of UMi Commercial Limited, without exception.

Details of this tender must not be disclosed or discussed with anyone outside of the tendering organisation without the express permission of UMi Commercial Limited.

Where this requirement is not adhered to, UMi Commercial Limited at their sole discretion may exclude the organisation from any further participation in the tender process and seek to start legal proceedings where damages are caused as a result of breaching this confidentiality clause.



**TENDER SUBMISSION FORM**

<b>Company Name</b>	
<b>Contact(s) or Relationships within UMi</b>	
<b>VAT Reg No</b>	
<b>Company Reg No</b>	
<b>Address</b>	
<b>Postcode</b>	
<b>Tender Contact Email Address</b>	
<b>Has your firm or any of its Partners/ Directors ever been declared bankrupt?</b>	
<b>Total estimate annual Professional Service Fees, including:</b>	
<b>Audit</b>	
<b>Accounts preparation</b>	
<b>Tax</b>	-

**Sustainability - the following questions must be answered by all suppliers \***

**Do you have the following policies?**

Environmental / Sustainability Policy	Y/ N
Anti-Bribery Policy	Y/ N
Health & Safety Policy	Y/ N
Equal Opportunities Policy	Y/ N
Do you take active steps to minimise your impact on the environment? e.g. by reducing waste and your use of raw materials and energy?	Y/ N
Do you hold an environmental management system accreditation such as ISO14001?	Y/ N
If 'No' to the previous question, do you have environmental targets & measurements?	Y/ N
Do you pay the Government's National Minimum/Living Wage?	Y/ N
Are you a recognised Living Wage Employer or Service Provider with the Living Wage Foundation	Y/ N
Do you produce a statement on Modern Slavery?	Y/ N
Are you working towards becoming a Net Zero or Carbon Neutral Organisation	Y/ N

\* UMi are committed to improving and understanding sustainability in our supply chain; if you answer NO to any questions it does not mean that we cannot work with you, and we understand that not everything is applicable to all organisations; but we do require this section to be completed by all suppliers.

**Declaration:** I certify that the information given on this form is correct

<b>Sign &amp; date</b>	
<b>Print name &amp; position in the organisation</b>	

Please ensure this document is included with your bid proposal, by the prescribed deadline.