The State Bar of California

OFFICE OF GENERAL SERVICES

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REQUEST FOR PROPOSAL CONTACT CENTER APPLICATION AS A SERVICE
Questions and Answers #4
August 17, 2023

1. Is vendor disqualified if it is NOT NIST and ADA certified? Vendor can provide SOC2. Also, vendor cannot accept Termination for convenience.
    - Any components that are public facing such as chats need to be ADA compliant or accessible friendly so that we can better support everyone who contacts us. We will accept SOC2. We can negotiate the termination for convenience clause.

2. Would you consider also outsourcing the contact center volume as part of this RFP?
    - The State Bar will evaluate all proposed solution that meet the requirements of the RFP, including proposed solutions that include outsourcing the contact center.

3. SalesForce: Are you looking for embedded framework?
    - Not necessarily, as long as the integration/interface meets the requirements stated in Attachment F of the RFP.

4. Odyssey: Can you describe the application you use, what it does, how your agents use it and what the API integration points are for it?
    - Odyssey is a Case Management Platform from Tyler Technologies. The description of the desired interface that State Bar is seeking is described in Attachment F of the RFP.

5. AS400: Does it have an RESTful End Point or do you have a middleware application we can use?
    - The AS400 environment does not have a RESTful End Point. We leverage middleware.

6. Teams: Are you looking for direct routing?
    - No. See response for question 8.

7. Can you list how many agents you have at any given time taking interactions and are you looking for a concurrent or named agent model?
    - There are a total of 10 agents and 3 managers. We are looking for named agent model.

8. For outbound calls, are you looking for your agents to make manual dials, click-to-dial (e.g. from SalesForce) or do you want a system that supports automatic dialing like preview dialing, etc.?
    - Outbound Manual Dialing.
    - Outbound Manual dialing from a State Bar directory lookup that there is a search by name, extension, and subject matter.
    - Outbound Preview Dialing: Agent signals when they're ready for another call and is presented with the information about the upcoming contact to prepare for the conversation.

- Outbound Progressive Dialing: Agent is able to view of the upcoming call and gives the agent time to review the content to personalize the conversation. This is similar to preview dialing in that agents indicate when they are ready for the next call. The difference is that the agents receive information about the customer at the same time the call is being made.
- Outbound Predictive Dialing: A predictive dialing solution connects to agents to live callers as soon as an agent is done with the previous. Predictive dialer systems algorithmically determine when the next call should take place based on metrics like average call duration. The system dials several numbers at the same time until a caller picks up and then directs the customer to the open agent.
- Outbound Power Dialing: Solution dials numbers for agents as opposed to agents dialing out themselves.
- Automated Callback presented to the Public Trust Representative (PTR).

9. In light of when questions are submitted and when we receive a response back on those questions, there isn't a lot of time considering this is due on 8/31/23. Would you consider an extension which would allow us to assess the answers to our questions and respond accordingly?
    - We are not considering any change to the response due date at this time.

10. Can you define what a “PTL” is?
    - PTL is the Public Trust Liaison. This role is assigned to the Executive Director and is included in the management count for the Supervisor license.

11. Can you define what a “PTR” is?
    - PTR is a Public Trust Representative. This role is also known as the agent that services callers.

12. Can you clarify this question “As a PTL I can generate reports for files that led to recommendations”
    - The PTL would like the ability to collect data in a field, custom field or tag for all caller interactions that will be collected to generate reports.

13. Is the expectation that the contact center solution handle workflows and automation and not SalesForce?
    - There is an expectation that workflows could be created that could be reassigned to internal office staff and external to maintain visibility of the entire lifecycle of an interaction until solved by all impacted roles. This does not include Salesforce information displayed in the takes outside of the caller profile information. The internal State Bar user should be able to view all related tasks in a workflow that are required to be conducted in an external application as part of the workflow as an assignment, reassignment, task, and each status until completed.

14. Can you clarify this question “As a PTL I can generate reports on future reporting data.”
    - This is similar to #3 and the collection of the data. This is the ability to create historical reports utilizing data collected on all caller types and interactions from the implementation date to the current date.

15. Can you clarify this question "As If an agent is not available licensee will be placed in a queue so an Ethics agent can pick up my call when they are free"
    - This would be the ability to transfer a caller to a different office, division, program, or business unit by reassigning to their queue if they do not take live inbound calls or transferring the caller to their queue when they have staff assigned to their "brand" as an agent role.

16. Can you clarify this question "Agent answer a call made directly to the Ethics hotline answer questions from licensees"
    - The State Bar requires the ability to have groups and queues for offices outside of the 1st implementation of the main Contact Center that is not shared. However, we required the ability to maintain visibility of the reassignment to the correct Office/Owner queue of the subject matter's status for servicing in a dashboard and/or reporting.

17. Can you clarify on this question "Agent set the outgoing caller ID to show general 2150 number licensees do not get direct number for agents"
    - For standardization, when making an outbound call from the CCaaS, the caller ID should be one of our main State Bar phone numbers and not the State Bar assigned staff phone numbers or extensions.

18. Will the agents ever take payments over the phone? Do you require PCI compliance?
    - In a future phase to support optimization, there may be a need to accept credit cards/debit cards. Yes, the application is required to be PCI compliant as well as a way to redact PCI data that is overtly sent in an email.

19. As a Contact Center Power User, I want to have the ability to create forms or templates, can you please define this a bit more?
    - The idea is that a Power User is a role assigned to a staff member within a business unit and not IT staff so they could create templates or forms (dependent of the feature), without assistance from IT. The role does not necessarily fall under an agent or management. It could be an additional role.

20. Do you require a FedRamp environment?
    - FedRamp is not a requirement.

21. Can you divulge the agent counts for this requirement, and the specific amount of agents for each department?
    - Number of contact center agents is ten (10) agents, and there are three (3) manager accounts.

22. Also, do you know how many other applications this new contact center platform will need to integrate with, and can you list all of them?
    - The application interface inventory is provided in Attachment F of the RFP. The attachment includes a description of each of the desired interfaces.