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UC RFP Template Solution Description Contact Management

The Unified Communications (UC) RFP Template Toolkits focus on the new solutions that are enabled by new communications capabilities, not on the evolution of established communications tools such as calling, basic voice conferencing, voice mail, e-mail, calendar or web. For an overview of eight (8) UC Solution categories that are supported by the UC RFP Template Toolkits, please visit www.UCStrategies.com.

This is the UC Solution Description for Contact Management.

Description: Contact Management

UC Contact Management provides improved management of access to appropriate people and resources by both external customers and internal enterprise employees supported by profiles, rules and enterprise information coordinated across contact channels. A key goal of this application is to shorten business process cycles and improve customer and supplier relationships by dramatically increasing the rate of first-call response, action, service or resolution for any incoming customer or partner request; the result is either significant revenue increase/acceleration or a reduction in total staff needed for the customer-facing roles, or a combination of both.

The major business process improvement goals for this application area include:

- Faster transaction completion, which usually increases revenue or volume and lowers asset requirements.
- Competitive advantage with customers and clients.
- Elimination of the labor and time for return calls or messages, queue management, etc.
- Possibly shifting contacts to lower cost staff or to self-service resources.

UC technologies needed for this application are:

- Basic UC Tools including:
 - Find-me/Follow-Me application with Rules that can be managed through software and integrated to the business processes, including the ability to route incoming contact requests to anyone in the appropriately assigned team. A number of providers offer

find-me/follow-me functions, so it will be important to pick one type to be the primary find-me/follow me server, then assess whether or not other tools are needed.

- Unified Messaging to converge all the messaging queues related to incoming contact requests and the follow-up and response to those requests. This includes message access and action from an appropriate set of devices, usually including a mobile data device such as a RIM BlackBerry, Windows Mobile device, or a mobile device equipped with a PBX-based communications client.
- A mobility voice communication client, capable of controlling and, preferably, transmitting the appropriate set of media (voice, text, images, etc.). This could be provided by an IP PBX client, a mobile desktop client, or possibly a mobile carrier client with synchronization to the enterprise applications (e.g. Blackberry).
- Advanced UC Tools including:
 - Presence with “rich presence” features (location, current task, skills, etc.) that is integrated to methods and applications, similar to the experience in contact centers, to maximize first call resolution of customer, client or constituent requests.
 - Integration to customer-related business applications to provide current information for each communication event and to allow incoming contact requests to be routed and served based on relevant customer information.
 - Integration to calendar information, to schedule follow-ups with automation of the call-back responses and closure tracking.
 - Contact Management Rules appropriate for the application. These rules go beyond the rules available to the individual to eliminate the tedious and erroneous manual processes of individual rules management. The rules would transcend the individual by looking across customer teams, roles, skills and locations.
 - Queue Management for any contact event that ends up in a queue, such as voice mail, e-mail, unified messaging, task, or appointment.
 - Multiple Links to Contacts to facilitate the optimal access mode. Important or regular customers, clients or constituents should be provided with the appropriate menus of access, including the presence indication of the relevant enterprise teams and resources.
 - Consulting and Professional Services to provide cross-client best practices knowledge and to assist in application design and implementation.

Technologies that are included in the RFP request and the potential suppliers are:

Technology Element	Typical Examples	Potential Suppliers
Presence Servers with “rich presence” capability	Microsoft Office Communication Server (OCS) 2007 IBM SameTime Jabber IP PBX Presence Servers All of the above to provide tools, toolkits or APIs, with VAR or ISV channels, to integrate for “rich presence”	Desktop Application providers, such as Microsoft, IBM, Jabber, et al. IP PBX providers such as Avaya, Cisco, Notel, Siemens, et al. Note that the IP PBX presence servers may have limited functionality, which would show in the RFP response.
Unified Messaging, preferably with message store in e-mail.	Avaya Unified Messenger AVST CallXpress Adomo Cisco Unity Microsoft UM in Exchange	IP PBX providers such as Avaya, Cisco, Notel, Siemens, et al. Independents such as AVST, Adomo, et al. Microsoft
Find-me, Follow-me	Features on IP PBX systems such as Nortel MCS, Siemens OpenScape, Cisco Mobility, Avaya Extension to Cellular, etc. Features on almost all voice mail systems. Features on Microsoft OCS and IBM SameTime.	IP PBX providers such as Avaya, Cisco, Notel, Siemens, et al. Voice Mail/Unified Msg. providers such AVST, all IP PBX providers, Microsoft UM in Exchange 2007. Desktop Application providers, such as Microsoft, IBM, et al.
Mobile Communications Client	Microsoft Mobile Communicator. IBM SameTime Everywhere IP PBX mobile clients, though most only support voice and voice mail. RIM Blackberry Some application providers	Microsoft IBM IP PBX providers such as Avaya, Cisco, Notel, Siemens, et al. RIM (Blackberry) BEA Systems, Oracle, SAP
Integrations To Business Apps, Calendar, et al.	Pro Services or VARs for the technologies listed above.	Pro Services or VARs for: Microsoft IBM IP PBX Providers RIM (Blackberry) BEA Systems, Oracle, SAP

Rules and Queue Management	Pro Services or VARs for the technologies listed above.	Pro Services or VARs for: Microsoft IBM IP PBX Providers RIM (Blackberry) BEA Systems, Oracle, SAP
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Potential Bidders for UC Contact Management

As indicated in the table above, there are three main types of bidders for the UC RFP for Contact Management: Desktop (fixed, mobile, virtual) application providers, IP PBX providers, and business application software providers. RIM is primarily a partner with or extension of the desktop application provider category.

Since the Desktop application providers can manage across more media types (by adding voice to e-mail, IM, calendar, web, etc.), the UniComm Consulting recommendation is to include at least your enterprise’s preferred Desktop Application provider in the selection of potential RFP respondents.

Please note that there is no requirement to purchase a new IP PBX or new E-mail or desktop application suite in order to achieve the benefits of the UC Contact Management applications, though many of the potential bidders will offer more functionality in conjunction with their latest software platforms.

To proceed with the UC Contact Management RFP process, please download and review the RFP sample and, if appropriate to your enterprise, please purchase a licensed copy for modification and publication to your potential bidders. Economical consulting services are also available to support your UC RFP process.

For questions, please visit www.UCStrategies.com or write to mparker@UniCommConsulting.com.