

Sample CCaaS IQA Response #2

Thanks for submitting this! I see you've submitted both the CCaaS and UCaaS (attached) IQAs, so this recommendation will take both into account. Below are our thoughts.

Requirements:

The customer is looking for 100 UCaaS seats and 86 CCaaS seats (14 of which are supervisors). Their contact center will require inbound voice, web chat, email, and SMS, as well as a predictive outbound dialer, IVR, skills-based routing, call recording, queue callback, agent scripting and dashboards & analytics. They'd like to integrate with Ontario Systems TCS, if possible, but are open to discussing replacement WFM/QM solutions with the suppliers. They have indicated a requirement for SSAE 18, HIPAA, PCI, and SOC2 Type 2 compliance from the chosen supplier. Their required UCaaS features include voicemail to email, call recording, mobile app, softphone, and potentially SMS, web/video conferencing, and eFax. Their budget is \$176 per user per month and they'd like to go live by March 2019.

Questions/Considerations:

1. What is your relationship with the client?
 - a. This will not impact our recommendations, rather, give us more insight into the opportunity.
2. What is the customer doing today to ensure compliance with PCI, HIPAA, SSAE 18, and SOC 2?
 - a. Is SSAE 16 compliance satisfactory instead of SSAE 18? – Most of our providers comply with SSAE 16, but not SSAE 18 quite yet.
 - b. What level of PCI compliance is this client subject to? Level 1? Level 2? Are they audited annually by a QSA as well as receive quarterly scans by an ASV?
3. What type of functionality is the customer looking for with integration with Ontario Systems TCS?
 - a. Features of this integration will have to be discussed with the providers' engineers to determine exactly if/how it can be done, and for what costs
4. What are their call recording requirements? On-demand? Record all inbound AND outbound calls? Some % of each? Recording retention requirements?
5. Will most agents be working from the same facility or will they be distributed across satellite/home offices?

Recommendations:

I'd start by looking at **Five9** here, as they are leaders in the CCaaS Gartner Magic Quadrant for 3 years running. They offer a very robust contact center that includes all the customer's required communication channels and CCaaS features. They also give their customers blended agent capabilities, giving them inbound and outbound functionality. Five9 has a solid set of APIs which can be used to build an integration with Ontario Systems TCS, but the exact functionality of that integration will have to be discussed with one of their engineers. Five9 does partner with CSA, Calabrio, and Verint (among others) if the client is open to exploring alternative options. Furthermore, Five9 gives their customers tools to ensure they stay within their compliance standards and stores their infrastructure in data centers that are regularly audited under SSAE 16 standards and has completed a SOC 2 Type 2 audit. Five9 partners

with **Fuze** for the UCaaS portion who can meet all the customer's UCaaS requirements and has one of the most advanced conferencing solutions in our portfolio. They ensure SSAE 16 SOC 2 Type 2 compliance standards and have tools and procedures to help keep the customer compliant with HIPAA and PCI. Five9s includes 30 days of recording storage per agent for a few dollars per month, after which point the customer must download or FTP those to another location. The customer will need to cover the cost of the hardware or offsite storage service for these recordings.

Another option here is **NICE inContact**, who is also a leader in the CCaaS Gartner Magic Quadrant and offers one of the most advanced contact centers in our portfolio. They can meet all of the customer's feature and compliance requirements (including PCI-DSS Level 1 compliance). InContact also has REST APIs which may be leveraged to build an integration with Ontario Systems TCS. For alternative WFM/QM solutions, inContact would leverage the NICE portfolio of solutions that are now part of their service offering. inContact offers pooled call recording for a few dollars per GB per month, and offers short and long-term archiving of recordings on their platform; offloading of recordings to other locations is available as well. They partner with several UCaaS suppliers in our portfolio. For this customer, I'd suggest leading with **RingCentral** who is a Gartner Magic Quadrant leader for UCaaS and has shown us great channel support. RingCentral can support all of the customer's UCaaS needs and also offers their RingCentral App (formerly known as Glip) for free which includes persistent chat, file sharing, conferencing, and more collaboration tools. Another partner of inContact's is Fuze (described above) if the customer seems more interested in them.

A third option here is **Evolve IP**. Evolve IP is a UCaaS/CCaaS provider who also specializes in other "as a service" models such as BaaS, DRaaS, IaaS, and more if the customer is interested in moving more aspects of their business to the cloud now or in the future. Evolve IP has a contact center that is nearly as technically robust as the likes of Five9 and inContact, but priced much more affordably. Like Five9 and inContact, Evolve IP allows their customers to have blended agents and can meet the rest of their needs including compliance (however, SSAE 16, not SSAE 18). Their UCaaS solution is based on a Broadsoft platform, whereas their CCaaS platform is proprietary, with open APIs to enable custom integrations into CRMs and other business tools, likely including Ontario Systems TCS. Keep in mind that any agent scripting with them is done on an individual case basis. The call recording platform supports 3 different delivery models: 1) record the calls and deliver them securely for storage (either on premise or in our cloud via dedicated virtual servers); 2) record the calls, store them in our cloud, and make them available to customer via our OSSmosis web portal; and 3) record the calls, deliver them to storage AND keep them in the cloud for access via OSSmosis.

Let us know your thoughts and how you'd like to proceed.