

Cloud Telephony

Request for Proposal

RFP Guide

Powering the journey to cloud telephony

Document Version

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Introduction

With the changing landscape of our working lives over the last few years, business-critical communications tools like telephony have been at the forefront for many IT organizations. Many companies have moved to a hybrid workforce, and with that, it’s become increasingly important to find a solution for telephony to support a flexible and connected team.

Wherever your company may be on your telephony journey, it is paramount to find the right partner to help guide and support you as you look to rationalize vendors and move away from legacy infrastructure. The right partner will help you future-proof your telephony solution so that future office moves or communications tools won’t mean additional telephony products.

The organizations we work with typically find themselves looking for a provider to help with 1 of the following options:

* Move to a single provider globally for SIP services
* Move to a cloud-based PBX system or telephony platform (eg Direct Routing through Microsoft Teams)
* Find a supplier that can cater to both of the options above

An effective RFP is a comprehensive way to ensure you find the partner that has the experience and resource to help you.

This document has been prepared by LoopUp to be shared externally as a guide to running a successful RFP for SIP services or Cloud Telephony.   
  
A successful RFP will help identify the right partner for your business, help maximise value, identify risks, and help drive rapid change. An effective RFP process will typically include the following characteristics:

* + Clearly defined project objectives
  + A comprehensive list of questions
  + An appropriate timeline with realistic milestones
  + Detailed instructions for submission, including a list of required documents

The following sections serve as a guide for an RFP for Cloud Telephony. Each section includes examples to help guide your team in creating a successful RFP, with the ultimate goal of finding you the partner best placed to deliver your solution.   
  
Should you wish to use this form as a template, you can easily insert your company name and details where indicated and remove the context in italics at the start of each of the sections.

# Company overview

*The more information you share in your RFP about your company, the more suppliers will understand how best to help you. This section should give a high-level overview of your company including any key milestones and strategic company objectives.*Examplesof information to share are below:

* Company History
* Industry vertical / product offering
* Strategic priorities

[Insert Company Overview here]

# Project overview

## *Clearly defining your project objectives is critical to the success of your RFP. Being clear about your objectives will help suppliers understand how best to highlight the parts of their response that will be most important to you, ultimately leading to a streamlined and interesting evaluation process for you and your procurement team.*

{COMPANY NAME} is looking to replace telephony across all our global operations. With [insert number] voice users spread across our [insert number] office locations, we are looking for a cloud-based solution to help support our changing workforce and support our company’s cloud-first strategy. Our Technology team is leading this project as they continue to implement innovative, forward-thinking technologies to improve the day-to-day operations of our global staff, and improve the experience for our customers.   
  
A list of the key objectives of this project can be found below:

* Increase flexibility for staff
* Improve experience for staff and customers
* Eliminate multiple vendors across different geographies
* Lower our carbon footprint
* Eliminate Grey IT
* Reduce Costs

## Project Timelines and contacts

The contact for this RFP is:  
  
Contact Name:  
Contact Title:  
Contact email:

|  |  |  |  |
| --- | --- | --- | --- |
| Key Milestone | Date | Responsible | Comments |
| RFP Issued | TBD | {COMPANY NAME} |  |
| Intent to Bid | 3 business days from issue date | Supplier |  |
| Supplier clarifications | 1 week from issue date | Supplier |  |
| Supplier clarification responses | 1 week from supplier clarification due date | {COMPANY NAME} |  |
| RFP Submission due | 30 days from supplier clarification responses | Supplier |  |
| Review Period | 2 weeks from RFP Submission date | {COMPANY NAME} |  |
| Clarifications and Supplier Presentations | 2 week period to commence after review period | {COMPANY NAME} |  |
| Contract Award | 1 month from end of prior period | {COMPANY NAME} |  |

### Intent to Bid

All suppliers wishing to participate in the RFP must submit an Intent to Bid letter to the contacts listed in section 2.1 no later than 5:00 p.m. local time on [insert date]

### Clarifications

Suppliers will have the opportunity to seek clarification on any of the sections detailed in the RFP. Please submit clarifications to the contacts listed in section 2.1 no later than 5:00 p.m. local time on [insert date].

### Submission

Suppliers are required to submit their response via email to the contacts listed above in section 2.1 no later than 5:00 pm local time on [insert date].

# Current state of Telephony

*A critical piece of a successful RFP is providing as much detail as possible so that suppliers have a clear picture of your current setup. This section should be as detailed as possible including but not limited to: sites, locations, DDI numbers, network diagrams, and usage statistics including country of origin if possible.*

## Site Information

Please find detailed information broken down by site in the table below:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Site Name | Site Address | | Number of Users | Number of DDIs | Any special requirements (eg analogue) |
|  |  | |  |  |  |
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## Network Diagram

Please find a high-level diagram of {COMPANY NAME}’s current setup below:

[Insert Diagram Here]

## Usage statistics

## Please find a detailed usage report showing {COMPANY NAME}’s call usage statistics including call origin and destination for the last 90 days in the accompanying document [insert title of usage statistics document]

# Scope of RFP

*Providing as much detail as possible in the scope of your RFP will impact the success of your RFP. It’s important to give suppliers a clear picture of your desired setup. This section should detail the most important aspects of the solution you’re looking for.* *Note: This example uses Microsoft Teams, but can be easily tailored to your internal communications tools if you’re not using Microsoft Teams or if you’re looking for a SIP solution.*   
  
{COMPANY NAME} is looking for a single global provider for a telephony solution to integrate with Microsoft Teams. Over the past 2 years {COMPANY NAME}’s adoption of Microsoft Teams has grown significantly, and as it’s become an integral part of our day-to-day operations, we believe moving to a telephony solution that integrates with Microsoft teams will help leverage that adoption and contribute to our cloud-first strategy.   
  
{COMPANY NAME} is looking to work with a supplier that can provide a single, globally managed solution that will allow {COMPANY NAME} to consolidate multiple vendors to one. The preferred method for the solution is through a fully cloud based solution delivered via Direct Routing for Microsoft Teams. In locations where supplier doesn’t currently offer a cloud-based solution, supplier should propose an alternative that will allow {COMPANY NAME} to have a single vendor globally.   
  
Given the importance of telephony in the day-to-day operations of {COMPANY NAME}, telephony is recognized as a critical tool for our users’ productivity, and for our company’s success. With that, the supplier we partner with must provide a solution that meets our technical, operational, and security standards. The supplier will be asked to complete the compliance matrix that accompanies this RFP, but please find additional context around these critical requirements below.

## General Requirements

As stated above, {COMPANY NAME} is looking for a cloud hosted Telephony solution. This solution must enable users to make and receive domestic and international calls.   
  
{COMPANY NAME} is looking for a supplier that will provide an end-to-end service with ongoing support that ensures a consistent, reliable, and secure solution throughout the life of the contract. The supplier that {COMPANY NAME} chooses will have a core focus on the solution, including company resource allocation as well as strategic and future plans. {COMPANY NAME} is looking to work with a supplier that focuses on innovation and continued improvement of the solution.   
  
As part of the implementation, {COMPANY NAME} is looking for a supplier that will manage the porting of numbers in each of the locations listed in the scope of the RFP. In addition, {COMPANY NAME} will be looking to supplier to be compliant in emergency calling services in each of the locations in the scope of the RFP.   
  
The supplier must demonstrate deep knowledge of voice solutions and show the ability to assess which features may be beneficial to {COMPANY NAME}’s users (eg voicemail, call queues, hunt groups, etc).

Global management of the solution through an online tool is a critical requirement of the solution, and Suppliers who are able to provide an online portal should detail the capabilities within your response to the Core requirements compliance matrix as well as in your Proposed Solution.

## Technical Requirements

{COMPANY NAME} is looking for a supplier to match the technical requirements as detailed in the accompanying compliance matrix. The desired solution will have been designed with a particular focus on service reliability.  
  
The supplier should demonstrate any mechanisms in place to ensure system resilience, security, availability, and scalability. This includes a detailed description of any monitoring systems in place.  
  
The quality of the voice solution must be at or above industry standards for telephony. {COMPANY NAME} is looking to work with a supplier that pays particular attention to voice quality and has proactive measures in place to ensure the highest standards of quality are delivered at all times.

{COMPANY NAME} is looking to work with a supplier that demonstrates a high level of Microsoft expertise. Any relevant accreditations or certifications of the company and relevant staff should be included in Supplier’s response.

## Implementation Requirements

{COMPANY NAME} is looking to work with a supplier that offers an end-to-end managed service, including a tried and tested Implementation approach. This implementation approach must have clearly defined milestones and include a dedicated team of highly experienced and accredited individuals.   
  
The implementation of the service must include meticulous planning, performance reporting, and it must ensure a seamless transition for {COMPANY NAME}’s users so that there is no disruption to their voice service.

## Operational Requirements

{COMPANY NAME} will take the Supplier’s operations model into careful consideration when choosing a supplier. The Supplier must offer a dedicated Account Manager to oversee the day-to-day operations of the service, and be the main point of contact for all matters related to the service and contract management.   
  
{COMPANY NAME} will also look to work with a supplier that demonstrates a proactive operations model, that is closely governed and regularly reported on.   
  
The supplier’s Service Delivery team should be proactive in resolving issues reported and have clearly defined escalation procedures and communication commitments.

## Support Requirements

{COMPANY NAME} is looking for a supplier that provides 24 x 7, multi-lingual support. The support team must have clearly defined processes for resolution, escalation, and communication. The supplier must provide support for any administrative requests, and configurations. The supplier should also assist with end-user trouble shooting.   
  
The supplier should include a description of their customer support processes in their RFP response, including how to report issues, and any systems available for ticket tracking.

## Security Requirements

Security is of utmost importance to {Insert COMPANY NAME}. The supplier must have a formal security governance, as well as a designated Information Security Officer. The supplier should include detail around security measures in place in the RFP response.

## Commercial Requirements

{COMPANY NAME} is looking for a flexible pricing model as the needs of the organization may change during the contract period. Supplier should provide all costs associated with the implementation and ongoing support of the solution in their RFP response.

# Structure and requirements of RFP response

*Detailed instructions with clearly defined requirements will ensure an efficient evaluation process for you and your team.*

Suppliers should submit their RFP response no later than [Submission Date, Time, and Timezone]. Suppliers must include the following documents with their response package. All documents should be titled “SUPPLIER NAME\_TENDERNAME RFP\_ORIGINAL DOCUMENT TITLE”.

|  |  |  |  |
| --- | --- | --- | --- |
| Document Title | Comments | | |
| Proposed Solution | Please include an executive summary and technical proposal that includes the detail as outlined in sections 5.1 and 5.2 below. | | |
| Compliance Matrix | Supplier should respond as instructed below in section 5.3 and 5.4 | | |
| Supporting documentation | Suppliers may include any necessary supporting documentation to support their response. Please clearly label the supporting documentation and reference where it is relevant in your RFP response | | |
|  | |  |

## Executive Summary

Suppliers should include the following information in their Executive Summary:

* Company overview including brief history, global locations, strategic goals, any other relevant information
* Key attributes – a list of any key attributes supplier believes sets them apart from the competition
* High level technical description including network diagrams
* Relevant Experience – Include Case studies, reference customers
* Team – CV/Personnel Bios of project team members

## Technical Proposal

Suppliers should include a detailed technical proposal paying careful attention to the requirements as detailed in Section 4. This document should include the following:

* Project Background – Supplier should state their understanding of the project objectives and requirements
* Proposed Solution - Supplier should provide a detailed description of the proposed infrastructure including network diagrams
* Environment Assessment
  + Site locations – list of locations included in the scope of the proposal as well as a detailed breakdown of the requirements at each site location
  + Analogue requirements – Supplier should include their recommendations related to any analogue devices that have been identified in the Current setup
  + Emergency Calling – Supplier should describe their approach to emergency calling requirements as they apply in each of the jurisdictions included in the scope of the project
  + Number Management – Supplier should describe their porting process as well as any requirements for ordering new numbers
* Call Flow Requirements – Supplier should describe how they will assess and configure call flow requirements.
* Devices – Supplier should describe how they help with device selection and implementation
* 3rd Party integrations – Supplier should describe how they will integrate with any 3rd party solutions
* Approach – Supplier should describe in detail the implementation approach and include a draft implementation plan
* Project Timeline – Supplier should include a project timeline based on the information provided in the RFP
* Assumptions – Supplier should list any assumptions that have been made

## Technical, Operational, Security, and Commercial Compliance

Supplier should reply to each of the requirements detailed in the “Core Requirements” tab in the following document:  
  
 

## Cost and Billing Requirements

Supplier should fill in the “Cost Analysis” tab in the file above in section 5.3

## Evaluation Criteria

{COMPANY NAME} will be using the following evaluation criteria to determine which supplier is best placed to deliver the solution:

|  |  |
| --- | --- |
| Criteria | Weighting |
| Technical Proposal | 35% |
| Implementation Plan | 20% |
| Relevant Experience | 20% |
| Cost | 25% |
| **Total** | **100%** |
|  |  |

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