



RFP GUIDE

Moving Your Global Telephony to the Cloud



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INSERT COMPANY NAME

Global Cloud Telephony

Request for Proposal

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1 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.

EXAMPLES of information to share:

- Company History
- Industry vertical / product offering
- Strategic priorities
- Global Footprint
- Recent News
- Plans for future growth

[Insert Company Overview here]

2 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.

Modify example below as appropriate:

[COMPANY NAME] has made the strategic decision to replace legacy telephony systems across our global operations. With [insert number] voice users, spread across [insert number] countries and [insert number] office locations, we are looking for a cloud-based solution to help support our evolving workforce and support a 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.

The goal of the project is to move all DDIs across various systems to Microsoft Teams via Microsoft's Operator Connect. We are looking for a single provider to deliver this solution to all our locations globally, and prefer to work with a supplier that pays close attention to the specific needs of our organization, with a particular focus on meeting the following project objectives:

- **Vendor Rationalization**

Objective: Reduce the number of telephony providers we have globally, move to a single global provider, and improve support processes by managing all telephony users through a single global management portal.

Rationale: Free up valuable IT resource and achieve economies of scale by simplifying telephony management. Empower our IT resource to focus on forward-thinking transformational projects rather than managing multiple telephony contracts and managing support tickets with multiple carriers.

- Consolidate Legacy PBX Systems**
Objective: Centralize telephony operations by retiring legacy PBX systems and moving to a cloud PBX managed through Microsoft Teams
Rationale: *Improve* operational efficiency by eliminating unnecessary hardware with ongoing maintenance costs and upgrade needs. Further support [COMPANY NAME'S] initiative to implement sustainable solutions and eliminate hardware that contributes to unnecessary energy consumption. .
- Modernize Communication Tools for Staff**
Objective: Deploy cutting-edge tools that truly unify the communications of our staff, enabling them to make and receive phone calls through any Microsoft Teams enabled device. Empower our staff to have a seamless and integrated experience, allowing them to make and receive phone calls using the same phone number and interface they use for all of their communications no matter where they are in the world.
Rationale: Create a collaborative and agile work environment with a competitive edge that aligns communication tools with the evolving needs of our dynamic workforce.
- Future-Proof Telephony that Scales with our Business**
Objective: Design a resilient, scalable telephony infrastructure capable of adapting seamlessly to future business needs; new offices, acquisitions, remote working etc.
Rationale: Prepare our communications tools for future business growth and organizational changes. Implement a scalable, flexible solution that will grow with us and minimize the possibility of any disruption to users during future transformational projects.
- Integrate Telephony into Microsoft Teams to Take Full Advantage of Microsoft Copilot and Future Advances in AI**
Objective: Integrate telephony with Microsoft Teams to ensure that phone conversations are part of the Microsoft communication stack (Teams and Outlook), therefore creating a holistic overview of all communications to leverage the full benefits of Microsoft Copilot (AI).
Rationale: Allow Copilot to work to its full potential by including crucial conversations, important customer interactions, and key decisions that are taking place over the phone. Elevate [COMPANY NAME] users to new levels of productivity by taking full advantage of Copilot's abilities, driving a competitive edge for our users and our customers.
- Enhance Security and Compliance Measures**
Objective: Manage compliance in every location ensuring [COMPANY NAME]'s communications systems remain compliant with local regulations. Improve operational security and user audit trail through central management portal.
Rationale: Mitigate potential risks and ensure that the telephony solution aligns with the highest standards of data protection and user management.
- Optimize Network Infrastructure for Telephony Traffic**
Objective: Assess and optimize the network infrastructure to ensure optimal performance for telephony traffic.
Rationale: Guarantee high-quality voice communications by working with a supplier that proactively manages capacity, redundancy, and voice quality.

[Insert Project Overview here]

2.1 Project Timelines and contacts

Your project timeline should have clear milestones, should be designed to give suppliers enough time to put together a quality response, and should give you enough time to properly evaluate the responses prior to contract award.

Modify example below as appropriate:

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}	

2.2 Intent to Bid

An intent to bid will help you know how many suppliers plan to participate, track engagement, and understand whether you need to send your RFP to additional suppliers. It's also a good test to ensure potential suppliers pay close attention to details. How a supplier conducts themselves during the RFP process is a good indication of how they will conduct themselves post contract award.

Modify example below as appropriate:

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]

2.3 Clarifications

Clarifications are a critical piece of ensuring a successful RFP process. This phase allows your suppliers to seek clarification and request additional information that will help them put together a quality response, ultimately making the evaluation process easier for you.

Modify example below as appropriate:

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].

When submitting clarifications, please clearly indicate which section of the RFP you are seeking clarifications on.

2.4 Submission

Clearly communicating the submission deadline and instructions will avoid any confusion for suppliers, which can create additional work for you.

Modify example below as appropriate:

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]. Any submissions received after this deadline may not be accepted.

3 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. This information can also be included in separate annexes to accompany the RFP.

3.1 Site Information

By detailing the current state of telephony per site, you enable suppliers to offer more accurate assessments, propose tailored migration plans, and provide solutions that align with your unique requirements. This approach fosters a more collaborative and informed vendor selection process, ultimately leading to the implementation of a cloud telephony solution that not only meets your needs but also optimizes the transition from your current telephony environment to the new cloud solution. Please note that we've included a template that you can download as part of this RFP toolkit.

Modify example below as appropriate:

Please find detailed information broken down by site in the attached

Site Name	Site Address	Number of Users	Number of DDIs	Any special requirements (eg analogue)

3.2 Network Diagram

A network diagram of your current telephony setup serves as a valuable reference point for potential suppliers. It helps them tailor their proposals to the specific requirements and challenges of your organization, ultimately leading to a more accurate and effective solution.

4 Scope of RFP

Providing as much detail as possible in the scope of your RFP will materially 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.

Modify example below as appropriate:

[COMPANY NAME] is prioritizing Operator Connect as the preferred connection method. The RFP emphasizes the need for a seamless integration plan to transition from our existing telephony setup. The scope includes configuring Operator Connect with a focus on optimizing call routing, quality of service, and overall system performance. The selected vendor should present a comprehensive strategy for consolidating telephony services across global locations, addressing regulatory compliance, and accommodating diverse telecommunication infrastructures.

The RFP places significant importance on the vendor's experience, requiring a proven track record in executing global telephony consolidation projects. Vendors are expected to provide case studies and references demonstrating successful implementations of Microsoft Teams Calling via Operator Connect. Scalability and redundancy are crucial aspects, and [COMPANY NAME] requires a solution that can accommodate the current and future user base with robust failover mechanisms to ensure uninterrupted service during in the event of an outage.

Another key element of the RFP is to find a vendor that will enable [COMPANY NAME] to manage our telephony solution seamlessly from a single interface. We have prioritized finding a partner that can deliver a global management tool with a rich set of features that will help simplify the support and maintenance of our telephony users. We're looking to manage our telephony globally, the same way we manage Microsoft Teams.

Integration with existing systems, including Active Directory, Single Sign-On (SSO), and collaboration tools, is a key consideration. Vendors are expected to showcase how their proposed solution seamlessly integrates with [COMPANY NAME]'S current IT infrastructure and aligns with compatibility requirements for hardware and software environments. Additionally, the RFP seeks a vendor who can implement performance monitoring tools and reporting mechanisms for insights into call quality, usage patterns, and issues.

4.1 Solution Requirements

Suppliers should complete the accompanying file Annex A: RFP Requirements and return with your RFP response package. Detailed instructions for completing the file are included in the "Instructions" tab.

5 Structure and requirements of RFP response

Detailed instructions with clearly defined requirements will ensure an efficient evaluation process for you and your team. Having a clear list of required deliverables for your RFP will ensure that you can properly evaluate your supplier responses against each other.

EXAMPLE: Suppliers should submit their RFP response no later than [Submission Date, Time, and Timezone]. Suppliers must include the following documents with their response package.

Document Title	Comments
Executive Summary	Please include an executive summary of your response. Executive summary must address the requirements as detailed in section 5.1
Technical Proposal	Please include a detailed technical proposal with your response. This technical proposal should address the requirements as detailed in section 5.2
Annex A RFP Requirements	Suppliers should complete the accompanying file Annex A RFP Requirements and include with your response package.
Annex B RFP Commercial Requirements	Suppliers should complete the accompanying file Annex B RFP Commercial Requirements and include with your response package.
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

5.1 Executive Summary

Requesting an executive summary will help suppliers demonstrate their understanding of your RFP. It will help you determine which suppliers have thoroughly reviewed your requirements and give them an opportunity to showcase any particular attributes of their solution and company that may be of key importance to you during your evaluation.

EXAMPLE:

Suppliers should include the following information in their Executive Summary:

- High-level understanding of the requirements of the RFP
- Detailed guide to the response documents prepared for the supplier's response, and where to find them
- Company overview of the supplier including a brief history, global locations, strategic goals, any other relevant information
- A list of any key attributes the supplier believes sets them apart from the competition
- A high-level technical description of the proposed solution, including network diagrams
- Relevant Experience – Include Case studies or reference customers
- Team – CV/Personnel Bios of project team members
- Description of the supplier's Service Delivery, Project Management, and Support Organizations
- Detailed overview of the supplier's security practices and controls in place to protect the integrity and confidentiality of [COMPANY NAME]'s data. Include any relevant certifications.
- Description of the supplier's Business Continuity and Disaster Recovery practices and any additional controls in place that relate to Service Continuity

- Overview of Supplier's continuous improvement policies and how the supplier proposes to implement new technologies to [COMPANY NAME] throughout the duration of the contract
- Overview of Supplier's Corporate Social Responsibility policy, highlighting any aspects of supplier's solution that will help [COMPANY NAME] promote social responsibility throughout the duration of the contract.

5.2 Technical Proposal

Requesting a technical proposal as part of your RFP is crucial. It will allow you to gain a comprehensive understanding of the supplier's technical capabilities and compatibility with your existing infrastructure. This insight ensures that the proposed system aligns with your specific business requirements, scalability needs, and technological preferences. A technical proposal also serves as a means to assess the supplier's expertise, outlining their approach to integration, data security, disaster recovery, and overall system performance. By seeking detailed technical information upfront, you empower your decision-making process, enabling you to make informed choices that contribute to the successful implementation and long-term success of your solution.

EXAMPLE:

Suppliers should include a detailed technical proposal paying careful attention to the requirements as detailed in Section 4 above. Suppliers are expected to prepare a comprehensive technical proposal that demonstrates their understanding of [COMPANY NAME]'S requirements as well as their proposed solution. The technical proposal should also demonstrate the supplier's experience in delivering solutions to similar companies, and should include, but not be limited to the following:

- **Project Background**

Supplier should state their understanding of the project objectives detailed in section 2 above and provide a detailed description of how the Supplier's proposed solution will help [COMPANY NAME] meet those objectives.

- **Proposed Solution**

Supplier should provide a detailed description of the proposed solution including network diagrams.

- **Site locations**

Supplier should provide a list of [COMPANY NAME] locations included in the scope of the proposal as well as a detailed breakdown of proposed solution, paying attention to the specific 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 the call flow requirements within the MS Teams phone system.

- **3rd Party integrations**

Supplier should describe how they will integrate with any 3rd party solutions.

- **Approach**

Supplier should describe their approach to implementation in detail and include a description of the key roles and responsibilities that will be involved from both sides.

- **Project Timeline**

Supplier should include a project timeline for the full implementation of the proposed solution that includes key milestones as well as the Supplier's

- **Assumptions**

Supplier should list any assumptions that have been made.

5.3 Cost and Billing Requirements

Requesting a detailed pricing proposal that encompasses all costs associated with the implementation and ongoing use of a cloud telephony solution is essential. It will provide transparency, ensuring that you have a clear understanding of the financial commitment involved. This includes not only the upfront implementation costs but also any potential hidden or unforeseen expenses. A comprehensive pricing proposal allows for accurate budgeting, enabling you to assess the total cost of ownership and make well-informed decisions based on your financial resources. Additionally, understanding the ongoing costs, such as licensing fees, maintenance, and support, is crucial for long-term planning and cost control. By requiring a detailed pricing proposal, you can avoid surprises, negotiate more effectively, and select a cloud telephony solution that not only meets your technical requirements but also aligns with your budgetary constraints for a sustainable and cost-effective deployment.

EXAMPLE:

Suppliers should complete the accompanying file Annex B: RFP Commercial Requirements and return with your RFP response package. Detailed instructions for completing the file are included in the "Instructions" tab.

5.4 Evaluation Criteria

Clearly defining your evaluation criteria when publishing an RFP will help set clear expectations for suppliers, ensuring they understand the specific parameters and attributes that your organization values in a solution. This clarity promotes a more accurate and standardized evaluation process, enabling you to compare proposals objectively.

Also, a well-defined evaluation criteria will serve as a guide for internal stakeholders involved in the decision-making process. It allows them to prioritize requirements and focus on the aspects that are most critical to the success of the project. This alignment ensures that the chosen solution not only meets technical specifications but also aligns with broader organizational goals and objectives.

Additionally, clearly outlined evaluation criteria help prevent misunderstandings and misalignments between your organization and suppliers. Suppliers can tailor their response to address the specific attributes you prioritize, leading to more relevant and meaningful responses.

EXAMPLE:

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

Criteria	Weighting
Executive Summary	10%
Technical Proposal	35%
Requirements	35%
Cost	20%
Total	100%