

CRM RFP Pro Forma Requirements Template for Customer Service and Support

Management Summary

Customer relationship management (CRM) is a customer-focused business strategy designed to optimize profitability, revenue and customer satisfaction. To realize CRM, organizations must implement collaborative enterprise processes and technologies that support customer interactions throughout all channels.

This report is one of a series and provides a pro forma requirements template for a request for proposal (RFP) for customer service and support (CSS) functionality — one of the domains of CRM. Enterprises requiring templates of pro forma requirements for sales or marketing should refer to the following companion reports.

- *“CRM RFP Pro Forma Requirements Templates for Sales”*
- *“CRM RFP Pro Forma Requirements Templates for Marketing”*

All enterprises pursuing CRM should review the general CRM overall requirements matrix and questionnaire included in *“CRM Software Requests for Information and Requests for Proposals.”*

The following material is intended to be a listing of the most commonly requested or desired functionality to support the customer service and support business function. Each enterprise has different needs and business requirements; therefore, not all functionality listed will be important or required for every enterprise. The requirements listing in this report is to be used as a guide. Enterprises should review the desired functionality carefully and tailor their RFP or request for information (RFI) accordingly. In addition, enterprises may need to add functionality capabilities to the listing, as it is not an all-inclusive list and serves as a guide only.

Gartner

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1.0 Inquiry Management — Inquiry Creation Capabilities

Inquiry Management — Inquiry Creation Capabilities	Current Available Version; Box Functionality	Generally (GA) Out-of-(OOB)	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						
Ability to create records of inquiries						
Multiple inquiry templates for different inquiry types						
Creation and customization of inquiry templates						
Inquiry categories for different inquiry types						
Creation and customization of inquiry categories						
Multiple customer-profile templates for different customer types						
Creation and customization of customer-profile templates						
Recording of all call activity data associated with a contact						
Features to expedite data entry by an agent						
Indicate if the application provides or supports the following capabilities to assist the agent in data entry:						
Automatically record date and time of inquiry creation						
Automatically record identity of agent receiving inquiry						
Entering postal code to validate city and state						
Entering postal code to automatically populate city, state and other pertinent fields						
Automatically assign a unique individual identification code (e.g., calling number)						
Automatically assign a unique individual identification code when importing data from external sources						

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Fields for salutations

Fields for entering customer name prefix
(e.g., Mr., Mrs., Miss and Ms)

Fields for entering customer name suffix
(e.g., III, Jr., Sr., MD or CFA)

Fields for indicating category of inquiry

Fields for indicating outcome of inquiry (e.g.,
customer satisfaction with interaction)

Fields for indicating follow-up activities

Display lists or menus containing multiple
options for indicating category of inquiry?

Display lists or menus containing multiple
options for indicating outcome of inquiry?

Display lists or menus containing multiple
options for indicating satisfaction of
customer with inquiry interaction?

Display lists or menus containing multiple
options for indicating follow-up activities?

Quick entry of data via word completion
capabilities (i.e., this feature entails
completing field-level data entry based on
recognition by the system of key characters)

Quick entry of data via word completion
capabilities when entering the following
specified data: customer data, action data,
product data, and agent-related data. Please
specify which in the comments box.

Quick entry of data via sentence completion
capabilities (i.e., this feature entails
completing field-level data entry based on
recognition by the system of key words)

Quick entry of data via sentence completion
capabilities when entering the following
specified data: customer data, action data,
product data, and agent-related data. Please
specify which in the comments box.

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Automatic entry of customer data via field-based auto-population (i.e., an entry in a field invokes population of a template with appropriate information)

Support automatic entry of interaction data via field-based auto-population

Support automatic entry of product data via field-based auto-population

Support automatic entry of agent-related data via field-based auto-population

During the creation of an inquiry record, does the application provide relevant lists of information, including:

Lists of standard problems?

Lists of most frequently used problems?

Flag to indicate that an address is a valid address?

Flag to indicate that a phone number is a valid phone number?

Flag to indicate that a fax number is a valid fax number?

Flag to indicate that an e-mail address is a valid e-mail address?

Once the information has been collected from the caller, indicate if the application permits agents to access account information, including the following:

Entitlement information needed to determine whether a request is billable

Ability to record a terms and maintenance quote should the request be billable

Ability to alert the service representative if a credit hold has been placed against the customer

Ability to notify account representative responsible for the caller's organization

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2.0 Predefined Data Entry Procedures

Predefined Data Entry Procedures	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application:						

Supports the ability to require agents to insert a minimum amount of data into a predefined number of fields before an inquiry can be closed

Identifies whether pre-defined procedures are being entered correctly

Prompts users of the correct procedure to follow

Provides online help when a procedure is incorrectly executed

Stops further actions once a data entry error is identified

Allows for automated line of business (LOB) codes to be used

Supports error elimination and reporting and build bullet-proof, error-free processes by reducing the scope for data-entry input error

Supports data input controls, including more forced input of required information

Supports the ability to indicate a repeat caller

Supports the ability for notes to be provided at key points in the inquiry creation process to enable the agent to elaborate on a data point

3.0 Data Tracking of Specified Data Within a Database

Data Tracking of Specified Data Within a Database	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application supports the tracking of the following specified data:						

Indicate if the application supports the tracking of the following specified data:

Summary information

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Inquiry ID (i.e., uniquely identifies the inquiry record)

Inquiry type (i.e., out of a predefined range)

Severity level or priority (i.e., out of a predefined range)

Source of inquiry, including:

Phone call

E-mail inquiry

Web inquiry (i.e., entered at a designated Web site)

Fax inquiry

Live walk-in

Status (i.e., out of a predefined range)

Number of days since creation

Number of days since last customer touch

Due date and time

Total time spent working on inquiry

Total time spent by specific service agent or user

Change data, inquiry history or audit trail (i.e., essentially, a log of all action data) (see below)

Relationship between inquiry, customers and organizations

Description (i.e., free-form data or notes section)

Ability to include a snapshot of any customer information in the primary company window so users need not navigate to other windows to find key information

Action-related data: indicate if the application provides for the following:

Date of action

Time of action

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Action type (i.e., out of predefined range), including:

Creation

Follow-up activity

Closure

Reopening

Carbon copy (i.e., spin-off or notification)

Hand-off (i.e., ownership or responsibility transfer)

Suspension for a specified period of time

Service agent/user responsible for action

Time required for action

Action description (i.e., free-form data or notes section)

Category of collateral already sent to a customer for a particular service event

Product or service-related data: indicate if the application provides for the following:

Product information

Product family

Product name

Product category

Product style

Product type

Part number

Serial number

Product warranty information

Shipping information: indicate if the application provides for the following:

Waybill data

Shipment date

Shipment time

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Shipment status

Service information (i.e., type, version, agent or department responsible)

Customer-related data: indicate if the application provides for the following:

Unique customer identification code that is assigned automatically

Standard Industry Code (SIC) for each company, with lookup to valid codes and descriptions

Dun and Bradstreet DUNS number

Tax Identification number (TIN)

Indicate if the product allows the customer profile to contain the following data:

Customer name

Customer contact position and title

Customer main (i.e., switchboard) number

Customer toll-free number

Customer address

Customer address allowing up to three lines of address information, in addition to city, state/province, country and postal-zip code

Unlimited number of addresses per individual

Indicate whether customer address remains valid

Customer contact information for primary contacts

Customer contact information for secondary contacts

Customer contact information for tertiary contact

Customer contact phone number

Customer contact e-mail

Customer e-mail 2

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Customer e-mail 3

Customer business

Customer business 2

Customer car

Customer home

Customer home 2

Customer home fax

Customer ISDN

Customer mobile

Customer pager

Unique organization identification code that is assigned automatically

Outline hierarchy of relationships between organizations

Link each company to a parent company or part of an organization if it is a subsidiary, division or branch office

Link each company to a family of companies, in addition to a direct parent company

Organization profile: company, subsidiary, department or branch office

Organization name

Organization address

Indicate whether organization address remains valid

Organization address allowing up to three lines of address information, in addition to city, state/province, country and postal-zip code

Organization contact information for primary contacts

Organization contact information for secondary contacts

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Organization contact information for tertiary contacts

Organization contact position and title

Accommodate unlimited number of telephone numbers and telephone types (i.e., fax, mobile, toll-free or main number) within an organization

Accommodate unlimited number of telephone numbers

Accommodate unlimited number of fax machines

Accommodate unlimited number of mobile phones

Indicate which telephone number is the primary number for communication

Accommodate unlimited number of e-mail addresses for each organization

Indicate which e-mail address is the primary e-mail address

Contract information or service-level agreements?

Customer entitlements

Customer contract value

Customer credit information

Current status of customer or trouble ticket

Indicate whether a trouble ticket is:

Active

Inactive

Escalated

Suspended

Indicate customer satisfaction based on feedback from follow-up call after inquiry is closed (e.g., satisfied or not satisfied).

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Ability to link and track an unlimited number of external companies or individuals to the client (e.g., consultant, reseller, retailer, wholesaler, accountant, systems integrator or contractor)

Ability to link and unlink an individual record to a different company record

Calls initiated by external entities (e.g., companies or individuals) on behalf of customer

Calls received by external service providers on behalf of the call center

CSS agent or user-related data: indicate if the application provides:

Agent or user profile

Agent or user name

Agent or user position

Agent or user department

Agent or user contact information (e.g., phone, e-mail or fax)

Agent or user skills

Agent or user availability

Total time spent by agent or user on all inquiries

Total time spent by agent or user on a specific inquiry

Indicate alternative agent or user

Indicate sales and marketing representative responsible for the account or customer

Indicate responsible external service provider partnerships

General data: indicate if the application provides:

Tracking of total number of open inquiries

Total number of open inquiries, per department

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Total number of open inquiries, per agent

Total number of open inquiries of type “x”
(e.g., overdue)

Total number of open inquiries, per
department

Total number of open inquiries, per agent

Tracking of total number of processed
inquiries

Total number of inquiries processed per unit
of time

Total number of inquiries processed per
department

Total number of inquiries processed per
agent

Response time statistics — overall

Response time statistics, per department

Response time statistics, per agent

4.0 User Follow-up and Accountability Tracking

User Follow-up and Accountability Tracking	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						
Capability to register and track follow-up activity						
Ability to track the hand-off (i.e., escalation) of overdue issues						
Audit tracking of all outstanding issues						
Ability to allow voice files of previous inquiries to be kept on customer's account						
Ability to allow for multiple users to access inquiries at the same time						
Ability to recognize and indicate that another individual or even other departments are following up a specific issue						

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A Microsoft Office-style side bar for each individual to note follow-up activity or allow for personal follow-up on an account

Video imaging

Ability to track a historical record for each call that enters the center to final hang-up (e.g., when the call is transferred, conferenced or sent to another location)

Tracking of attached data, e.g., digits entered by customer at an interactive voice-response (IVR) or customer-related data from the desktop

Tracking and integration of data for inbound and outbound calls in a call-blending environment

5.0 View/Search/Sort Capabilities — Workload Review

View/Search/Sort Capabilities — Workload Review	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						
Ability for service agents to review personal workloads at any point in time						
Capability to register and review follow-up activity						
Ability to allow service agents the flexibility to select for review opened, closed or new records						
Ability to allow service agents the flexibility to select for review any combination of opened, closed or new records						
Ability to allow different views of inquiries to be visible to all agents depending on their position in the organization						
Ability to allow a supervisor to review the workload of an individual service agent						
Ability to allow a supervisor to review the workload of an entire team or group of service agents						

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6.0 View/Search/Sort Capabilities — Inquiry Viewing Capabilities

View/Search/Sort Capabilities — Inquiry Viewing Capabilities	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Indicate if the application provides or supports the following:

Ability for service agents to view specified data for multiple records in table or list form. Please note that this means the agent does not have to open a particular record to access the specified data.

Viewing of the following data for multiple records in table/list form

Inquiry-related data: indicate if the application provides:

Inquiry ID (i.e., uniquely identifies the inquiry record)

Inquiry type (i.e., out of a predefined range)

Severity level or priority (i.e., out of a predefined range)

Source of inquiry, including:

Phone call

E-mail inquiry

Web inquiry (i.e., entered at a designated Web site)

Fax inquiry

Live walk-in

Status (i.e., out of a predefined range)

Number of days since creation

Number of days since last customer contact

Due date and time

Total time spent working on inquiry

Total time spent by specific service agent or user

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Change data, inquiry history or audit trail
(i.e., essentially, a log of all “action data”)
(see below)

Relationship between inquiry, customers
and organizations

Description (i.e., free-form data or notes
section)

Action-related data: indicate if the
application provides:

Date of action

Time of action

Action type (i.e., out of predefined range),
including:

Creation

Follow-up activity

Closure

Reopening

Carbon copy (i.e., spin-off or notification)

Hand-off (i.e., ownership or responsibility
transfer)

Suspension for a specified period of time

Service agent or user responsible for action

Time required for action

Action description (i.e., free-form data or
notes section)

Product or service-related data: indicate if
the application provides:

Product information

Product family

Product name

Product style

Product type

Part number

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Serial number

Product warranty information

Shipping information, including:

Waybill data

Shipment date

Shipment time

Shipment status

Service information: type, version, agent or department responsible

Customer-related data: indicate if the application provides:

Customer profile: name, contact information, position or organization

Organization profile: organization name, address, contacts or links

Contract information or service-level agreements

Customer entitlements

Customer contract value

Customer credit information

Customer satisfaction: from follow-up call after inquiry is closed

CSS agent or user-related data: indicate if the application provides:

Agent or user profile: name, position, department and contact information

Agent or user skills

Agent or user availability

Total time spent by agent or user on all inquiries

Total time spent by agent or user on a specific inquiry

General data: indicate if the application provides:

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Total number of open inquiries

Same as above, per department

Same as above, per agent

Total number of open inquiries of type "x"
(e.g., overdue)

Same as above, per department

Same as above, per agent

Total number of inquiries processed per unit
time

Same as above, per department

Same as above, per agent

Response-time statistics: overall, per dept,
and per agent. Specify which in comments.

7.0 Searching Mechanisms

Searching Mechanisms	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						
Use of search mechanisms and parameters						
Indicate if the application supports searching for records using specified data, including:						
Inquiry-related data: indicate if the application provides:						
Inquiry ID (i.e., uniquely identifies the inquiry record)						
Inquiry type (i.e., out of a predefined range)						
Severity level or priority (i.e., out of a predefined range)						
Source of inquiry, including:						
Phone call						
E-mail inquiry						
Web inquiry (i.e., entered at a designated Web site)						
Fax inquiry						

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Live walk-in

Status (i.e., out of a predefined range)

Number of days since creation

Due date and time

Total time spent working on inquiry

Total time spent by specific service agent or user

Change data, inquiry history or audit trail (i.e., essentially, a log of all "action data") (see below)

Relationship between inquiry, customers and organizations

Description (i.e., free-form data or notes section)

Action-related data: indicate if the application provides:

Date of action

Time of action

Action type (i.e., out of predefined range), including:

Creation

Follow-up

Closure

Reopening

Carbon copy (i.e., spin-off or notification)

Hand-off (i.e., ownership or responsibility transfer)

Suspension for a specified period of time

Service agent/user responsible for action

Time required for action

Action description (i.e., free-form data or notes section)

Product or service-related data:

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Indicate if the application permits users to conduct searches based on product information, including:

Product information

Product family

Product name

Product style

Product type

Part number

Serial number

Versions of products or services

Product warranty Information

Indicate if the application permits users to conduct searches based on shipping information, including:

Waybill data

Shipment date and time

Status of shipment

Estimated time of arrival of shipment

Indicate if the application permits users to conduct searches based on service information, including:

Type

Version

Responsible agent or department

Customer-related data: indicate if the application provides:

Customer profile: name, contact information, position or organization

Organization profile: organization name, address, contacts or links

Contract information or service-level agreements

Customer entitlements

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Customer contract value

Customer credit information

Customer satisfaction: from follow-up call after inquiry is closed

CSS agent or user-related data: indicate if the application provides:

Agent or user profile: name, position, department and contact information

Agent or user skills

Agent or user availability

Total time spent by agent or user on all inquiries

Total time spent by agent or user on a specific inquiry

General data: indicate if the application provides:

Total number of open inquiries

Same as above, per department

Same as above, per agent

Total number of open inquiries of type "x" (e.g., overdue)

Same as above, per department

Same as above, per agent

Total number of inquiries processed per unit time

Same as above, per department

Same as above, per agent

Response time statistics — overall

Same as above, per department

Same as above, per agent

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8.0 Sorting Functions

Sorting Functions	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						
Ability for users to sort listed records by specified data						
Inquiry-related data, including:						
Sorting of listed records specified by the following data:						
Inquiry ID (i.e., uniquely identifies the inquiry record)						
Inquiry type (i.e., out of a predefined range)						
Severity level or priority (i.e., out of a predefined range)						
Source of inquiry, including:						
Phone call						
E-mail inquiry						
Web inquiry (i.e., entered at a designated Web site)						
Fax inquiry						
Live walk-in						
Status (i.e., out of a predefined range)						
Number of days since creation						
Due date and time						
Total time spent working on inquiry						
Total time spent by specific service agent or user						
Change data, inquiry history and audit trail (i.e., essentially, a log of all "action data") (see below)						
Relationship between inquiry, customers and organizations						
Description (i.e., free-form data or notes section)						

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Action-related data: indicate if the application provides:

Date of action

Time of action

Action type (i.e., out of predefined range), including

Creation

Follow-up

Closure

Reopening

Carbon copy (i.e., spin-off or notification)

Hand-off (i.e., ownership or responsibility transfer)

Suspension for a specified period of time

Service agent or user responsible for action

Time required for action

Action description (i.e., free-form data or notes section)

Product or service-related data:

Ability to permit users to sort records based on product information, including:

Product information

Product family

Product name

Product style

Product type

Part number

Serial number

Versions of products or services

Product warranty information

Ability to permit users to sort records based on shipping information, including:

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Waybill data

Shipment date/time

Status of shipment

Estimated time of arrival of shipment

Indicate if the application permits users to sort records on service information, including:

Type

Version

Responsible agent or department

Customer-related data: indicate if the application provides:

Customer profile: name, contact information, position or organization

Organization profile: organization name, address, contacts or links

Contract information or service-level agreements

Customer entitlements

Customer contract value

Customer credit information

Customer satisfaction: from follow-up call after inquiry is closed

CSS agent or user-related data: indicate if the application provides:

Agent or user profile: name, position and department, contact information

Agent/user skills

Agent/user availability

Total time spent by agent or user on all inquiries

Total time spent by agent or user on a specific inquiry

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General data: indicate if the application provides:

Total number of open inquiries

Same as above, per department

Same as above, per agent

Total number of open inquiries of type “x” (e.g., overdue)

Same as above, per department

Same as above, per agent

Total number of inquiries processed per unit time

Same as above, per department

Same as above, per agent

Response time statistics — overall, per department, per agent. Specify which in comments.

9.0 Status Change Execution and Review

Status Change Execution and Review	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						

Ability to change the status of a record based on progress made in servicing the inquiry

Visibility on the status of each inquiry record by agent and groups of agents

Visibility on follow-up actions

Listing of call backs to customers

Ability to reopen a record

Ability to edit specific data within a record

Ability to link a reopened record to a series of other specified records

Ability to perform the following actions on multiple records selected from a list:

Multiple closure of inquiry records

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Multiple reopening of inquiry records

Multiple printing of individual inquiry records to a local printer

Indicate if the application supports access to all customer contact online, including:

Work orders

Application for service

Debit authorizations

Letters

E-mail and Internet correspondence

Statements

Direct mail history

Does the application support the ability to link system to databases of partners or contracted organizations?

Does the application support video imaging?

10.0 Inquiry Template Management — Predefined Templates

Inquiry Template Management — Predefined Templates	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						
Predefined templates for supporting inquiry processes?						
Predefined templates designed to support industries, including the following:						
Banking						
Consumer packaged goods						
Entertainment						
Financial services						
Government: country (e.g., France)						
Government: European Union						
Government: U.S. federal						
Government: U.S. state and local						

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- Healthcare
- Higher education
- Insurance
- Media
- Manufacturing: process
- Manufacturing: discrete
- Pharmaceuticals
- Retail or wholesale
- Services
- Telecommunication
- Transportation
- Utilities

11.0 Template Customization and Definition

Template Customization and Definition	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						

Ability to allow customization or definition of templates without programming or changes to source code

Ability to allow users to customize and define specified data types or ranges without programming, including:

Inquiry-related data

Inquiry ID (i.e., uniquely identifies the inquiry record)

Inquiry type (i.e., out of a predefined range)

Severity level or priority (i.e., out of a predefined range)

Status (i.e., out of a predefined range)

Number of days since creation

Due date and time

Total time spent working on inquiry

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Total time spent by specific service agent or user

Change data, inquiry history and audit trail (i.e., essentially, a log of all “action data”)? (see below)

Relationship between inquiry, customers and organizations

Description (i.e., free-form data or notes section)

Action-related data: indicate if the application provides:

Date of action

Time of action

Action type (i.e., out of predefined range), including:

Creation

Closure

Reopening

Carbon copy (i.e., spin-off or notification)

Hand-off (i.e., ownership or responsibility transfer)

Suspension for a specified period of time

Service agent or user responsible for action

Time required for action

Action description (i.e., free form data or notes section)

Product or service-related data: indicate if the application provides:

Product information

Product family

Product name

Product style

Product type

Part number

CRM RFP Pro Forma Requirements Template for Customer Service and Support

Serial number

Product warranty information

Shipping information: indicate if the application provides:

Waybill data

Shipment date

Shipment time

Shipment status

Service information: type, version and agent or department responsible

Customer-related data: indicate if the application provides:

Customer profile: name, contact information, position or organization

Organization profile: organization name, address, contacts or links

Contract information or service-level agreements

Customer entitlements

Customer contract value

Customer credit information

Customer satisfaction: from follow-up call after inquiry is closed

CSS agent or user-related data: indicate if the application provides:

Agent or user profile: name, position, department and contact information

Agent or user skills

Agent or user availability

Total time spent by agent or user on all inquiries

Total time spent by agent or user on a specific inquiry

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General data: indicate if the application provides:

Total number of open inquiries

Same as above, per department

Same as above, per agent

Total number of open inquiries of type “x” (e.g., overdue)

Same as above, per department

Same as above, per agent

Total number of inquiries processed per unit time

Same as above, per department

Same as above, per agent

Response time statistics — overall, per department, per agent. Specify which in comments.

12.0 E-mail Inquiry Management Capabilities — E-mail Services

E-mail Inquiry Management Capabilities — E-mail Services	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						

Service inquiries via e-mail

Utilization of e-mail as a communication channel for receiving and responding to inquiries

A means to create inquiry records from received e-mails

Ability to initiate and send out e-mails

A routing system to direct e-mails to an appropriate resource

Ability to allow an e-mail inquiry to be directed to the same queue displayed by the screen pop as voice calls

Identifiers for e-mails residing in a queue that distinguish them from voice calls

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Designating different priorities to e-mail queues

Automatic transmission of a standard e-mail in response to an inquiry that confirms receipt of inquiry

Automated e-mails based on keywords within a text message

Automated e-mails transmitted based on status of customer inquiry or escalation processes

An auto-reply e-mail that sets expectations on entitled services (e.g., when to expect a response, level of service or service agent)

Ability to allow agents responding to e-mail inquiries to be placed automatically in an unavailable state for receiving voice calls

A process for tracking, monitoring or querying inquiries submitted via e-mail

Ability to track customer responses to transmitted e-mails

Ability to respond to a customer's e-mail via fax or phone

Ability to enable the user to define the details of the outbound and inbound e-mail servers available for use in the e-mail channel communication process?

A full point-and-click application for creating personalized mail and e-mail documents?

Ability to allow for embedded URL's to drive customers to Web sites

Ability to allow for the user to specify the rules to be used for processing inbound e-mail messages within each mailbox

Rule-satisfied routing capabilities

No-rule-satisfied capabilities

Optional delete

Ability to initiate an e-mail-forwarding event

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Multiple e-mail delivery servers

Ability to offer mail-merge personalization capabilities

Plain text

HTML

Ability to produce high-volume output for both mail and e-mail distribution

Multiple SMTP servers for e-mail distribution

Does the application require a blaster or other software for e-mail handling?

Does the application integrate with an Apache port for e-mail delivery?

13.0 Web Site and Internet-based Support — Web Support

Web Site and Internet-based Support — Web Support	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						
Generation of inquiries from a Web site						
Ability to track and query inquiries generated from a Web site						
Web interactivity, including allowing the agent to guide a customer through the appropriate Web site (e.g., provide a guided tour)						
Ability for a customer browsing a Web site to establish an immediate connection to an agent						
Customers establishing a chat session with an agent via a Web site						
Customers of submitting a request for a call back via a Web site						
Ability to allow a Web site-originating inquiry to be directed to the same queue displayed by the screen pop as voice calls						

CRM RFP Pro Forma Requirements Template for Customer Service and Support

Identifiers of Web site-originating inquiries residing in a queue that distinguish them from voice calls

Designating different priorities to Web site-originating inquiries within queues

Transmission of a standard e-mail in response to an inquiry that confirms receipt of Web site-originating inquiry and sets expectations on entitled services (e.g., when to expect a response)

For Web site-originating calls, indicate if the application supports options for a customer to review while waiting in a queue, including:

Ability to review Web pages of interest

Ability to hear recorded messages

Ability to be connected with an IVR unit

If a Web site-originating inquiry requests a call back, does the application allow an agent to automatically contact the customer?

If a Web site-originating inquiry requests a call back, does the application allow an agent to manually initiate contact with the customer at a convenient time?

Does the application support attaching hyperlinks to specific accounts?

Indicate if the application supports a sophisticated log-file analysis program for monitoring the Web interface to CRM database that includes the following metrics:

Number of successful transactions performed online, tracked weekly

Which specific transactions were successfully completed, tracked weekly

Number of incomplete or unsuccessful transactions performed online, tracked weekly

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Specific transactions that were left incomplete, abandoned or failed — tracked weekly

Participation metrics for all current online promotions, contests and instant-wins — tracked weekly

Number of total Web-site visits, sieved by originating time zone, day and time of day — tracked weekly

Number of unique Web site visitors, sieved by originating time zone, day and time of day — tracked weekly?

Number of repeat Web site visits in the preceding month vs. single visits in the preceding month

Growth of personal home-page creation tracked monthly

Growth of additional householder profile creation tracked monthly

Growth of electronic service utilization

Results of online “trouble-shooting” success and failure, tracked weekly

Number of banner ad impressions, tracked weekly

Number of banner ad clickthroughs

Number of calls initiated from the Web site to the call center, including where the visitor was on the Web page at the time of this type of request

Visitor analysis metrics that include the following:

Visitor type (i.e., current customers, lapsed customers, prospects that we are aware of, visitors, etc?)

Frequency of use

Time of day of use

Time spent on site per visit

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Day of week of use

State-based location

14.0 Fax Inquiry Support

Fax Inquiry Support	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						

Utilization of fax as a communication channel for receiving and responding to inquiries

A routing system to direct faxes to an appropriate resource

Ability to allow fax to be directed to the same queue displayed by the screen pop as voice calls

Identifiers for faxes residing in a queue that distinguish them from voice calls

Designating different priorities to fax queues

Transmission of a standard fax in response to an inquiry that confirms receipt of inquiry and sets expectations on entitled services (e.g., when to expect a response, level of service or service agent)

A means to create inquiry records from received faxes

Ability to allow agents responding to fax inquiries to be placed automatically in an unavailable state for receiving voice calls

A process for tracking, monitoring or querying inquiries submitted via fax

15.0 Web Self-Service Capabilities

Web Self-Service Capabilities	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						

Self-service facilities that can be utilized over the Web

Alternative payment preferences

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Indicate if the application supports electronic billing, including via:

Online with credit card

Direct debit with bank or credit card

IVR with credit card

Does the application support the tracking of activities by customers when viewing their e-bills (e.g., purchases made or visits to linked Web sites)?

Does the application support e-mailing reminders to clients with accounts overdue?

Does the application track clients that pay on time?

Does the application support the ability to e-mail receipts for all transactions?

Does the application support analysis to refine the targeting of future e-bill messages to individual customers? Can customer activity be tracked to determine areas of interest, even when no purchase is made?

Does the application support opportunities to cross-sell products and services? The application would increase brand awareness and generate new revenue through cross-selling and advertising sales.

Does the application support the presentation of information through a limitless number of Web links accessible to self-selected customers? This process enables the concept of one-to-one marketing to be realized, with the use of tracking systems.

16.0 Account Review

Account Review	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						

Ability for clients to review their accounts

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Ability for clients to upgrade or downgrade services online

Ability to enable clients to request lower-priced packages

Ability to enable clients to review and request upgrade trials or promotions for a specified period of time

Ability to allow different costing options to be established for trial periods. One trial or promotion might be billable, while another might be offered free of charge.

Ability to allow clients to authorize additional persons to subscribe to services (e.g., additional householders might want to subscribe to premium offerings encompassing special arrangements)

Ability to establish multiple personal profiles for an account as part of a business-to-consumer relationship over the Web

Offering personal identification numbers

Fully automated system for assisting a client with discovering a lost or forgotten personal identification number

Ability to allow primary or preferred subscribers to temporarily suspend a service via the Web

17.0 Trouble-Shooting

Trouble-Shooting	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Ability for customers to trouble-shoot issues with products or services via a Web site

A trouble-shooting guide on the Web site that is interactive and intuitive

Ability to have images and to drill down through the images embedded in the guide

Ability to accompany the guide with live voice files for providing direction

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Ability to track individual subscriber's activity when they are attempting to resolve issues

If the trouble-shooting area were to log an incomplete transaction, does the application support sending an automated (but personalized) courtesy e-mail to check with the subscriber if their problem has been resolved?

Does the application support sending a pro-active call or e-mail to a client if they have accessed trouble-shooting segment of the Web site more than a defined number of times in a given period?

Does the application support an express callback service that is billed to the account via the Web site?

Does the application support the ability to route the subscriber to the call center?

Does the application support the ability to have a call-center agent make a pro-active call to ensure that a customer's trouble-shooting needs were met?

18.0 Promotions

Promotions	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						

Presenting promotions via the Web self-service interface

Indicate if the application enables clients to use electronic services, including:

All online and IVR transactions

See and print statements online

Make payments online and modify billing details

Select and order specific services, including entertainment, digital services online

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Review and or download the magazine online, which would be enriched for interactivity

Upgrade tier level online

Move online

Purchase products and services online

Reschedule a pending installation

Initiate a service call

Initiate a change order

Order an additional magazine

Order fulfillment's free or fee paying for necessary forms or appliances

Cancel a service call

Request service suspension

Ability to download all forms and manuals

19.0 Personal Profiles

Personal Profiles	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Ability for clients to develop personal profiles that are accessible to the organization

Incentives for clients to create and maintain personal profiles

Ability for clients or subscribers to update or keep current the following via the Web:

Call history and status of any outstanding requests with the organization

Primary subscriber contact information

Primary subscriber account information

Information pertaining to households

Information pertaining to subscriber's interests

Demographic information

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Hobbies, interests or lifestyle preferences

Ability for other members of a household to develop a profile

Ability to design and broadcast promotions that appeal to specific profiles

Ability to recognize the appearance of lapsed customers when they visit the Web site

Ability to inform the lapsed visitor of new promotions since their last visit to the Web site

Ability of subscribers to change geographic location of receipt of services (e.g., services rendered by utilities or telecommunication companies)

Ability for subscribers to change the address where products or services would be received without human intervention

Ability to allow customers to confirm that a new address has access to services via a Web site

Ability to allow customers to register a change of address and automatically receive e-mail confirmations

Ability to allow customers to receive transfer offers by e-mail or post

Ability to allow customers to receive confirmation of moving to/from/when details by e-mail or postal service

Ability to allow customers to make changes to details on a booked move. Options should be supported to limit scope and frequency of changes to the initial indication of a change of address.

Ability to have customer records carried through to a new address

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20.0 Knowledge-Base Engine

Knowledge-Base Engine	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						
Search mechanisms for identifying like solutions to a problem						
Search engines that encompass the following basic capabilities:						
Keyword search						
Part of a keyword						
Exact word search						
Boolean search						
An unlimited number of parameters for Boolean searches						
Full text (i.e., but no rule-base)						
Decision tree (i.e., but no rule-base)						
Bubble search (i.e., a relevancy search for most recently asked questions pertaining to similar subjects)						
Bubble search (i.e., a relevancy search for most commonly asked questions pertaining to similar subjects)						
Search engines that encompass the following advanced capabilities:						
General decision tree						
General inference engine						
CASE-based						
Adaptive learning						
Index filtering						
Neural net						
Fuzzy logic						
Full text or semantic network						

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During the search operation, indicate if the search engine supports the following capabilities:

Present relevant hits before entire search is complete

Float the most relevant hits to the top in order of closest match

Allow the agent to launch another parallel search

Allow the agent to multitask and use the application to perform other work

Use synonyms to improve search result

Use of a keyword glossary

If a problem has been reported previously, indicate if the knowledge engine, based on the results of the search, supports the following problem resolution capabilities:

Provide a list of standard problems

Provide a list of most frequently experienced problems

Provide a list of standard problem-solving actions

Provide a list of most frequently employed problem-solving actions

Suggest a list of problem-solving actions

Provide a list of required skills to resolve a problem

Indicate if the knowledge engine, based on results of the search, supports the following automatic actions:

Fill the inquiry record template with relevant data

Provide a list of agents or specialists with the skills necessary to solve the problem

Route the inquiry to the appropriate service agent or analyst

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Does the application permit service agents to populate knowledge bases?

Does the application support the ability to populate and manage the knowledge base as follows:

Only experts can populate and manage the knowledge base.

Service agents can populate the knowledge base only after expert verification or approval.

Service agents can directly populate the knowledge base; experts then manage it.

Knowledge base provides the means to automatically detect duplicate entries and notify an expert.

Knowledge base provides the means to automatically detect similar entries and notify an expert.

Indicate if the knowledge-base engine supports actions on duplicate database records representing the same person or organization, including:

Detection

Prevention

Reconciliation or merger

Are outdated, duplicate or similar entries retired manually by experts?

Are outdated, duplicate or similar entries retired automatically with expert supervision?

Does the knowledge engine provide the means for content management and retrieval of information residing on Web sources?

Does the knowledge engine have the ability to identify and display specific URLs containing pertinent information on products, services, incidents or problem resolution techniques?

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Does the knowledge engine have the ability to identify and display specific sets of URLs containing pertinent information on products, services, incidents or problem resolution techniques?

Does the knowledge engine have the ability to provide a site map pertaining to product information, services, incidents or problem resolution techniques?

Does the knowledge engine have the ability to limit the granularity of information (i.e., depth of information) displayed by a Web site map?

21.0 Product Information Knowledge-Base Support

Product Information Knowledge-Base Support	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Indicate if the knowledge base supports the following types of proprietary content:

Marketing encyclopedias

Corporate policies and procedures

Product information

Problem resolution or trouble-shooting information

Sales information in question-and-answer format

Dealer lists

Indicate if the knowledge base permits service agents to access the following product-focused information:

Listing of product names

Listing of product families or categories

Listing of complementary product families

Listing of parts

Listing of complementary parts

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Listing of part numbers

Listing of services

Listing of complementary services

Listing of suppliers of products being resold

Listing of manufacturers of products being resold

Listing of prices

Listing of available quantities for specific products

Listing of unit sizes available

Listing of expected delivery dates for specific products

Listing of best price available for an individual item

Listing of best price available for a user-defined number of items

Listing of re-negotiated deals and special combination purchase discounts

Listing of deals and promotions

Does the application support the ability to accompany product information with images and scripts tailored for responses to specific product families?

Does the application support the ability to drill down on images and suggest problem resolution advice and script guides to address client inquiries?

22.0 Quality Assurance Capabilities

Quality Assurance Capabilities	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Indicate if the application supports quality assurance records.

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Indicate if the application creates quality assurance records derived from incident reports.

Indicate if the quality assurance record encompasses the following:

Incident description

Priority

Current status

Product(s) involved

Version(s) of product(s) involved

Source of record

Source of problem or incident

Type of problem

Agent assigned to resolve incident

Solutions or fixes provided

Track product or service incidents

Track corrective actions or resolution of product or service incidents

Prioritize resolution of product or service incidents

Prioritize resolution of product or service incidents by customer type

Prioritize resolution of product or service incidents by account history

Prioritize resolution of product or service incidents by size of sales opportunity

Track product development or enhancement projects

Prioritize product development or enhancement projects

Prioritize product development or enhancement projects by customer type

Prioritize product development or enhancement projects by account history

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Prioritize product development or enhancement projects by size of sales opportunity

Forecast potential sales revenue associated with specific product enhancements

Track product defects

Track product defects by customer

Track product defects by product or product families

Track product defects by product version

Track customer enhancement requests

Track enhancement requests by customer

Track enhancement requests by product or product families

Track enhancement requests by product version

Track change requests

Track change requests by customer

Track change requests by product or product families

Track change requests by product version

Track test cases

Link quality assurance records to customers who reported problems

Link a quality assurance record with specific support or service incidents

Link a quality assurance record to multiple customers

Link a quality assurance record to service issues

Provide unlimited user-defined fields for tracking information pertinent to quality assurance

Permit unlimited entry of comments regarding the problem and correction

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Support entry and storage of files, error messages, screen captures and other diagnostic aides as OLE attachments

Permit use of multi-level resolution code(s)

Indicate if the application supports the following additional functionality to track product incidents and resolution:

Defect management

Return materials authorization tracking

Does the application support tracking complaint resolutions

In managing complaints, indicate if the application supports the following activities:

Follow-up

Allocate complaints to external parties and track:

Recognition

Quality

Escalation

Reasons

Tasks

Actions

Offers

Resolutions

Satisfaction levels

Letters or correspondence

Indicate if the application supports the means to communicate the implementation of enhancements or resolution of defects, including the following:

Notify customers when enhancement requests have been implemented

Notify when corrective actions are adopted in response to incident reports (e.g., defects)

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Share quality assurance records within an organization between customer service, field service, quality control, engineering, sales and marketing

23.0 Contract Management Features

Contract Management Features	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						
Storing, accessing and organizing contracts						
Ability to automatically verify entitlements						
Storing, accessing and organizing multiple types of contractual information, including:						
Contract coverage types						
Terms and conditions						
Service-level agreements						
Entitlements						
Warranty information						
User-defined contract types						
Service contract customer code						
Service contract or warranty numbers						
Renewal and expiration dates						
Service contract limits						
Contract activity: phone support, field repair and maintenance						
Response time commitment by contract or service type						
Contract quote letters						
Deferred revenue reports						
Scheduled service calls as item of contract						
Customer credit checking and holds						
User-defined billing cycles						
History of any breach of terms and conditions						

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History of any breach of fees

Ability to track invoice statements

Access to imaged copies of invoice statements available for browsing and 12-month history displayed

Access to imaged copies of all legal paper work that contains a customer signature, including legal documentation from partners

Ability to store and track contracts for multiple companies within a company

Ability to store and track contracts for multiple subsidiaries within a company

Ability to store and track contracts for multiple departments within a company

Ability to store and track multiple contracts for a company for multiple geographies

Ability to prioritize by contract type

Ability to accommodate multiple contacts from a single customer site

Ability to support multiple contracts per client address

Ability to support multiple products or services covered by each contract

Ability to automatically flag expiration of entitlements

24.0 Subscription Management

Subscription Management	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support the ability to manage subscriptions in a business-to-consumer environment?

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Indicate if the application allows the creation of a body of business rules and logic that simplify subscription management functions and processes, including:

Connect order

Initiate fulfillment process

Disconnect process

Discontinue subscription process

Transfer process

Service upgrade process

Service downgrade process

Service call requests

Pay-per-view requests

Authorization payment process

Re-scheduling service

Taking payment

Does the application support scripting based on their financial value to combat non-payment?

For accounts with incorrect phone details, does the application support forced messages to confirm or obtain more data?

For promises to pay, does the application support the ability to track payment deadline and alert agents the following day if no payment was received, prompting for discontinuation of services?

Does the application support scripting of past-due rules?

Does the application support the ability for breach fees to be automatically applied based on rules (e.g., client not paying bill for service rendered)?

CRM RFP Pro Forma Requirements Template for Customer Service and Support

Does the application provide automatic crediting of offers based on triggers in customer behavior (i.e., member referral campaigns)?

25.0 Customer Billing

Customer Billing	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support access to customer financial histories?

Does the application allow information to be summarized and used as necessary to assess risk and prompt appropriate action?

Does the application identify previously written off accounts?

Does the application identify habitual delinquency?

Does the application identify outstanding equipment from previous services rendered?

Does the application support message pops to alert agents of need for collection before any further services are rendered?

Does the application have the ability to identify dishonored checks, credit card or direct debit failure history?

Does the application have the ability to identify promise-to-pay?

Does the application have the ability to identify clients in a state of bankruptcy?

Does the application have the ability to track invoice statements?

Does the application support access to imaged copies of invoice statements available for browsing and 12-month history displayed?

Can agents fax, e-mail or post any previous statement from the desktop?

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Does the application track agent activity with regard to collections, including:

How often?

When calls have been made, including dates and time?

Promise to pay?

Identity of caller?

Routes the call to the collections agent if this is the latest status of the account?

Does the application support automated collections warning functions including having letters e-mailed, faxed or posted?

Does the application support the ability to generate education packs, which trigger recurring billing calls to be sent via e-mail, fax or post?

Does the application support payment methods?

Does the application support multi-payer invoicing per account to accommodate services rendered to shared households?

Does the application support the ability to track customer nominated multi-payer methods per account (i.e., monthly service vs. pay per view)?

Does the application support payment plans for specified customer segments?

Does the application support the ability to keep a history of all current and historical data of ongoing authority to pay (e.g., direct debit from bank account or credit card)?

Does the application support the ability to have all payment forms imaged and available online?

Does the application support EDI interfaces between any other contractor for all paperwork?

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Does the application support online (i.e., real time) validation of all credit card transactions?

Does the application support automated sales prompts during the collections process?

Does the application initiate a prompt for ongoing authority to pay based on previous fulfillment history?

Does the application prompt for ongoing authority if numerous one-off credit card payments are being made via IVR or calling into the call center?

Does the application support providing offers to convert to ongoing credit card payments?

Does the application support receipt confirmation for all credit card payments and recorded against the customer history regardless of whether received via IVR or customer agent?

26.0 Workflow Assignment

Workflow Assignment	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
Indicate if the application provides or supports the following:						

A workflow engine or work-routing capabilities

Ability to create and manage administrative workgroups

Assignment of work to different groups or service agents for resolution, and maintain listing of assignments

Assignment of work to external parties or subcontractors

Indicate if the application supports the following inquiry assignment capabilities:

Manual assignment of an inquiry to a particular agent or specialist

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- Automatic assignment by customer or account
- Automatic assignment by problem type
- Automatic assignment by status
- Automatic assignment by severity level
- Automatic assignment by date and time (i.e., calendar routing)
- Automatic assignment according to agent or analyst availability
- Skills database for agents or specialist
- Ability to suggest best agent for an inquiry according to agent or analyst skills
- Ability to automatically assign best agent according to agent or specialist skills
- Support reassignment of work to another agent or group of service agents when an agent is absent (e.g., sick, out to lunch, late to work or prematurely departed)
- Flag and alert if more than one service agent is working on a particular inquiry
- Flag excessive reassignment of inquiry records
- Flag excessive number of inquiries per agent
- Indicate if the application supports the following additional workflow related capabilities:
 - Internal messaging between service agents
 - Internet messaging with non-service agents
 - Staff modeling
 - Project management

27.0 Customer Service Calendar Management and Scheduling

Customer Service Calendar Management and Scheduling	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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CRM RFP Pro Forma Requirements Template for Customer Service and Support

Does the application include a calendar management and scheduling engine for supporting service activities?

Indicate if the vendor's calendaring and scheduling engine supports the following capabilities:

Define times of availability for individual agents or analysts

Define times of availability for entire workgroups or domains

Define time of availability for other types of resources (e.g., rooms and equipment)

Verify the availability of individual agents or analysts

Verify the availability of resources

Identify available agents or analysts

Identify available resources

Identify or suggest available dates or times for agents or analysts

Identify or suggest available dates or times for resources

Define appointments for agents or analysts during hours of availability

Define more than one type of appointment for service agents (e.g., call or meeting)

Track time spent by service agents on one specific appointment

Track total time spent by service agents on more than one appointment

Track total time spent by agent on an inquiry from creation to closure

Track total time spent by agent on a group of inquiries from creation to closure

When a service agent is unavailable, indicate if the application supports the following capabilities:

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Notify the appropriate service agent or manager

Determine the cause of unavailability within the context of agent not on duty or too many inquiries

Log the cause of unavailability for audit trails

Route calls to an appropriate alternative service agent

Does the application provide the ability to check if more than one service agent is working on a particular inquiry or request, and alert the CSS service agents of such occurrence?

Does the application support the ability to perform automatic follow-up on specific date or time via visual or sound notification?

Does the application support the ability to perform automatic follow-up on specific date or time via visual or sound notification?

Does the application support the ability to perform automatic follow-up on specific date or time via e-mail?

Does the application support the ability to perform automatic follow-up on satisfaction of any user-definable criteria?

28.0 Escalation Capabilities for Services Activities

Escalation Capabilities for Services Activities	Current	GA	Configured	Through	Future	Comments
Indicate if the application provides or supports the following:	Version,	OOB		Partnership	Version	
	Functionality				and	
					Date	
Functions for executing user follow up and accountability activities						
Escalation management						
Ability to define sets of activities or procedures for specified categories of service requests						
Prioritization of activities						
Audit of all outstanding issues						

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Ability to automatically invoke a specific activity or procedure as a result of a predefined event

Ability to invoke a specific activity or procedure on demand by agents

Ability to allow thresholds to be defined based on business process rules that initiate events when exceeded

Automatic escalations of overdue issues

Automatic escalation of inquiries defined as representing repeated complaints

Ability to escalate issues to enforce accountabilities and resolution

Highlighting of overdue events using a traffic-light system

Ability to define activities that require authorization based on business process rules

Indicate if the application supports the following escalation capabilities:

Manual hand-off of an individual inquiry to individual service agent

Manual hand-off of an individual inquiry to multiple service agents

Manual hand-off of multiple inquiries to individual service agents

Manual hand-off of multiple inquiries to multiple service agents

Manual carbon copy (i.e., copy in appropriate peers or managers) of an individual inquiry to individual service agent

Manual carbon copy of an individual inquiry to multiple service agents

Manual carbon copy of multiple inquiries to individual service agents

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Manual carbon copy of multiple inquiries to multiple service agents

Automatic hand-off of an individual inquiry by customer or account

Automatic hand-off by problem type

Automatic hand-off by status

Automatic hand-off by severity level

Automatic hand-off by date and time (i.e., calendar routing)

Automatic hand-off according to agent or analyst availability

Automatic hand-off by other criteria

Automatic carbon copy (i.e., copy in appropriate peers or managers) of an individual inquiry by customer or account

Automatic carbon copy by problem type

Automatic carbon copy by status

Automatic carbon copy by severity level

Automatic carbon copy generated by date and time (i.e., calendar routing)

Automatic carbon copy generated according to agent or analyst availability

Automatic hand-off by other criteria

Automatic notification of hand-offs to all agents or analysts involved

Automatic end-of-shift routing (i.e., to avoid inquiries being left in limbo when a shift ends)

Automatically increase severity level when number of inquiries per agent exceeds a threshold

Automatically increase severity level when open time exceeds a threshold

Automatically change the severity level when user-defined criteria are satisfied

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29.0 Alerts and Notifications

Alerts and Notifications	Current	GA	Configured	Through	Future	Comments
Indicate if the application provides or supports the following:	Version,	OOB		Partnership	Version	
	Functionality				and	
					Date	
Ability to automatically alert or notify an agent or supervisor after certain thresholds have been met						
Ability to automatically alert or notify an agent or supervisor when specified data meet certain conditions, including the following:						
Inquiry-related data: indicate if the application provides:						
Inquiry ID (i.e., uniquely identifies the inquiry record)						
Inquiry type (i.e., out of a predefined range)						
Severity level or priority (i.e., out of a predefined range)						
Status (i.e., out of a predefined range)						
Number of days since creation						
Due date and time						
Total time spent working on inquiry						
Total time spent by specific service agent or user						
Relationship between inquiry, customers and organizations						
Action-related data: indicate if the application provides:						
Date and time of action						
Action type (i.e., out of predefined range). Examples include creation, closure, spin-off, hand-off or call						
Service agent or user responsible for action						
Time required for action						

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Action description (i.e., free form data or notes section)

Product or service-related data: indicate if the application provides:

Specific product information: part number, serial number, version or availability

Specific product warranty information

Specific shipping information: waybill data, shipment date/time, status or estimated time of arrival

Specific service information: type, version, agent or department responsible ?

Customer-related data: indicate if the application provides:

Customer profile: name, contact information, position or organization

Organization profile: organization name, address, contacts or links

Contract information or service-level agreements

Customer entitlements

Customer contract value

Customer credit information

Customer satisfaction: from follow-up call after inquiry is closed

CSS agent or user-related data: indicate if the application provides:

Agent or user profile: name, position, department, contact information

Agent or user skills

Agent or user availability

Total time spent by agent or user on all inquiries

Total time spent by agent or user on a specific inquiry

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General data: indicate if the application provides:

Total number of open inquiries

Same as above, per department

Same as above, per agent

Total number of open inquiries of type "x" (e.g., overdue)

Same as above, per department

Same as above, per agent

30.0 Basic Call Management and Routing Functions for Service Activities

Basic Call Management and Routing Functions for Service Activities	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support service inquiries via phone contact?

Does the proposed system tightly integrate with leading PBX systems, allowing the system to communicate and pass information between them?

Indicate if the system includes a tightly integrated voice processing system providing the following functionality:

Automated attendant or call prompting

Automated announcement or broadcast capabilities

Group voicemail boxes

Does the application support intelligent call routing?

Does the application accommodate calling line identification (CLI) features?

Does the application utilize CLI features supporting multiple phone numbers (e.g., home, work or mobile)?

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Does the application accommodate automatic number identification (ANI) features?

Does the application accommodate dialed number identification service (DNIS) features?

Does the application support direct inward dialing (DID)?

Can the application receive calls based on unique client ID number and not the telephone instrument?

Does the system support alternate routing on a dynamic basis?

Indicate if the system supports the following call routing features:

Routing based on number of service agents logged on

Routing based on number of service agents available

Routing based on number of calls in queue

Routing based on age of oldest call

Call route scheduling based on time of day

Call route scheduling based on day of week

Call route scheduling based on day of year

Call screening

Look-ahead routing

Product or services based routing

Skills based routing

Routing based on predefined business rules

Routing based on agent efficiency (i.e., the available agent with the highest current close rate)

Route calls based on customer ID number and not their telephone number

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Route calls based on unique customer service agent ID

Does the application support the ability to route a customer to the agent they last spoke to?

Does the application support the ability to route a customer to the team they last spoke to?

Does the application allow a customer to speak to the same agent every time for more personalized attention?

Does the application support departmental routing i.e., past due to collections?

Does the application support nuisance callers to team management?

Does the application direct VIP callers to qualified or experienced agents?

Does the application support routing based on existence of an outstanding request?

Does the application support customized routing to accommodate call overflow that does not require changes to source code?

Does the application support routing of overflow based on average time to answer in target group?

Does the application support routing of overflow based on average time to answer in overflow group?

Does the application support routing of overflow based on average time for callers to abandon anywhere in queue?

Does the application support routing of overflow based on average time in queue?

Does the application support routing of overflow to designated customer service teams?

Does the application support routing of overflow to customer service teams based on domain product or service expertise?

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Does the application support routing of overflow to alternate call centers in different geographic locals?

31.0 Database Support in Call Management

Database Support in Call Management	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Indicate if the application supports the use of information and logic residing in databases to route calls based on the following:

Customer attributes

Buying patterns

Language spoken

Account balance

Origin of call

Topic of call

Does the application employ database information for identifying high-risk customers?

Does the application employ database information to direct high-risk customers to qualified or experienced agents each time they call?

32.0 Call Queuing IVR and Call Blending Support

Call Queuing IVR and Call Blending Support	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Indicate if the application accommodates the following queuing features, including:

Priority queuing based on DNIS

Priority queuing based on ANI digits

Priority queuing based on time in queue

Priority queuing based on identifying customers that are repeat callers

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Agent-based personal queuing

Skills-based queuing

Queuing to multiple groups responsible for different services

Change of priority of call while in queue

Transfer of calls back to queue

Indicate if the application provides or supports the following:

Ability to provide an estimated time delay before an agent is available to receive a call

Ability to calculate an estimated wait time for calls in a queue

Calculation of estimated wait time based on real-time rolling averages

Calculation of estimated wait time based on historical averages

Interfaces with IVR to track and manage call activities

Ability to track what options were selected within the IVR

Ability to track length of time of interactions between client and IVR options

Ability to integrate with an IVR in a fashion that enables clients to respond to surveys and have the data automatically populated into the customer history record

Gathering of demographics in IVR and having this data automatically populated into the customer history record

Ability to transfer customer at the end of call to the IVR for surveying and having this information then automatically populated into the customer history

Ability to have customers on hold receive messages pertinent to the caller based on CLI features

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Ability to have customers on hold receive messages pertinent to the caller based on a unique customer number

Ability for a caller to request a call back rather than wait in a queue?

Ability to allow a caller to determine call back date and time

Can call back request be automatically routed to a queue when an agent becomes available?

Indicate if the application supports LOB blending and prioritization, and support one queue for all types of inquiries, including:

Calls inbound and outbound

Letters

Faxes

E-mails

Internet

33.0 Basic Call Center Agent Interface Features Supporting Services

Basic Call Center Agent Interface Features Supporting Services	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support soft phone capabilities (i.e., phone features available via use of a personal computer)?

Indicate if the application supports a soft phone-centric interface encompassing the following:

Holding time displayed

Call origin displayed (i.e., phone, Web, IVR, e-mail, fax or letter)

Calls in queue displayed

Provide specific details of calls currently in a queue

Number of calls still holding displayed

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Number of calls in queue for categorizing by category of call

Calling or called party name display

Time and date

Dialed digits

Duration of call display notification

Incoming automatic call distribution (ACD) event alerting standard ring

Incoming ACD event alerting ring option

Does the application alert agent of upcoming calls (i.e., call to be given to you within the next two minutes)?

Does the application support verbal call introductions or “whispers” about incoming calls, especially if originating from IVR and Web?

Does the application support coordinated voice and data screen pops based on who is calling and send the call and data simultaneously to the appropriate agent?

Does the interface support the ability to identify the stage at which the customer exited the IVR, and present the voice and data to the agent with the customer details on a screen simultaneously?

Does the application provide screen pops to accompany calls conveying specified standard customer contact information?

Does the application support screen pops and coordinated transfer via IVR?

Indicate if the application supports screen pops automatically populated with callers' customer service history details on screen, including:

Information pertaining to last client call

Information pertaining to purchase of specific products

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Information pertaining to subscription to specific services

Support automatic contact history including programming inquiries, standard customer history notes, complaints or commendations

Does the application record and identify repeat callers?

Indicate if the application provides or supports the following:

Recording of customer demographics automatically

Ability to capture the time, date and purpose of initial enquiry

Screen warnings for extended talk times or long hold times

Screen warnings for sales and upgrade opportunities

Screen alerts for service levels or grades of service associated with each call type, (i.e., with time invested with call displayed may enforce automatic wrap-up)

Does the interface support the following features: online directory, announcements, support paging information or support text messages?

Does the application support automatic recognition of performance and alert colleagues of exceptional sales, call handling performances, with online congratulations for identified agents?

Does the application provide one-button access to execute call management features (e.g., hold or conference)?

Does the application interface support "single-click" access to options and streamlined business functions (e.g., new service requests or upgrades to services)?

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Indicate if the application provides or supports the following:

Ability to initiate telephone recordings of inquiries at the discretion of operator or management

Recordings based on call types

Recordings based on call types to ascertain basis for customer complaints (e.g., understand churn)

Automated recordings of escalations

Ability to store recordings of conversations to be available for playback at a later date

Ability for recordings to be played back at an account level to address complaints or disputes

34.0 Interfaces Features Pertaining to Queuing, Call Selection and Call Transfers

Interfaces Features Pertaining to Queuing, Call Selection and Call Transfers	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application allow service agents to select a specific call from queues based on information from a screen display?

Do the interface features allow the agent to choose the next call to receive?

Can a supervisor disable the call selection option?

Can the agent automatically configure a rest period between calls?

Can the rest period be defined?

Can the agent define work status, including:

Availability?

Post-call work state?

Logged-on status?

Logged-off status?

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Does the application keep a log of all accounts the agent accessed during the day and allow for updating at any time after the initial call was taken?

Does the application support the ability to send messages to external organizations or field resources indicating the absence of clients at sites scheduled for dispatched support?

Does the interface support agent-to-agent communications?

Does the application support synchronization features on transfer, including conferencing capabilities?

Does the interface allow agents to execute unattended call transfers?

Does the interface allow agents to execute attended call transfers?

Does the application allow agents to transfer appropriate data that was invoked when the call was received?

Does the application support the ability to add new information before transfer or present a different but related data screen?

35.0 Call-Center Service Script

Call-Center Service Scripts	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Access to scripts within a workflow-based, dynamically generated interface designed to guide the service agent through a client interaction

Access to an unlimited number of scripts tailored to a specific contingency

Scripting functionality that is automatically invoked based on business rules and presented through screen pops

CRM RFP Pro Forma Requirements Template for Customer Service and Support

Ability to alert agents how long the customer was in the queue and introduce scripting to use this data to empathize for long waits

Access to scripts with branching logic that enable service agents to consider alternative actions

Branching logic that presents a question or suggestion to the service agent based on a response communicated by the customer

Ability to allow service agents to view different display options, including entire scripts, select portions of scripts or outline views

Scripts that encompass features that allow service agents to perform online calculations

36.0 Call Blending Support for Inbound and Outbound Call Activity

Call Blending Support for Inbound and Outbound Call Activity	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application interface support call blending and allow inbound and outbound calls to be handled by the same pool of representatives?

Indicate if the application interface supports presentation of different lists, screen displays and scripts tailored to support an agent's possible role, including:

Inbound service call activities

Outbound service call activities

Inbound sales call activities

Outbound sales call activities

Online real-time sales, adherence and call handling trackers for agents

Online real-time key performance indicator measurements per agent for week's activity

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Will the application interface support letter, fax and e-mail capabilities from desktop for customer communications?

Does the interface support fax automation?

Does the interface support the creation of an outbound fax by selecting a customer fax number from a contact list?

Does the interface support the creation of an outbound e-mail by selecting a customer e-mail address from a contact list?

Indicate if the application supports interfaces with predictive dialing capabilities for executing outbound call activities, including:

Proactive follow-up with customers

Customer satisfaction surveys

Customer requested callback or follow-up

Welcome calls

Confirmation calls

Connect order re-scheduling

Collections

37.0 Service Activities Reporting

Service Activities Reporting	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application natively service reporting capabilities? Natively means the reports are directly and automatically generated from the application or a seamlessly integrated component of the application suite without requiring any customization.

Does the application provide a separate report generator?

Indicate if the application supports the native production of reports based on the following data:

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Inquiry-related data:

Inquiry ID (i.e., uniquely identifies the inquiry record)

Inquiry type (i.e., out of a predefined range)

Severity level or priority (i.e., out of a predefined range)

Status (i.e., out of a predefined range)

Number of days since creation

Due date and time

Total time spent working on inquiry

Total time spent by specific service agent or user

Change data, inquiry history and audit trail (i.e., essentially, a log of all action data) (see below):

Relationship between inquiry, customers and organizations

Description (i.e., free-form data or notes section)

Action-related data: indicate if the application provides:

Date and time of action

Action type (i.e., out of predefined range).
Examples are creation, closure, alert, hand-off or call

Service agent or user responsible for action

Time required for action

Action description (i.e., free-form data or notes section)

Collateral sent to a customer in response to a service event

Product or service-related data, including:

Reporting on inquiries for product information

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Reporting on “product information” inquiries
by:

Product family

Product

Part

Services

Reporting on inquiries for product warranty
information

Reporting on “warranty” inquiries by:

Product family

Product

Part

Services

Reporting on inquiries on shipping
information, including:

Requests for waybill data

Requests for shipment date or time

Requests for shipment status

Requests for estimated time of arrival

Reporting on inquiries on service information

Customer-related data: indicate if the
application provides:

Customer profile: name, contact information,
position or organization

Organization profile: organization name,
addresses contacts or links

Contract information or service-level
agreements

Customer entitlements

Customer contract value

Customer credit information

Service outcome

CRM RFP Pro Forma Requirements Template for Customer Service and Support

Customer satisfaction (i.e., from follow-up call after inquiry is closed)

CSS agent-related data: indicate if the application provides:

Service agent profile: name, position, department and contact information

Service agent skills

Service agent availability

Total time spent by agent or user on all inquiries

Total time spent by agent or user on a specific inquiry

38.0 Service Inquiry Statistics on Call Center Performance

Service Inquiry Statistics on Call Center Performance	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Indicate if the application supports key performance indicators for call center activities stored and tracked in real-time at the desktop, including:

Grade of service overall

Average handling time

Abandonment rate

Does the application support different evaluation models based on call type and average handling time (e.g., a different call type or average handling time for billing calls as opposed to sales calls)?

Does the application allow call type broken down into specified tasks with average handling times calculated at this level (e.g., time to perform a sales call may vary with respect to talk time and conclusion time as opposed to a billing call)?

Does the application allow all data stored in the call model to be used to analyze performance of personnel?

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Does the application allow targets and actuals to be stored for different time intervals (i.e., weekly, monthly, yearly and accessible in real-time)?

Does the application have the ability to capture statistics on each inquiry's lifetime in the system real-time and historically?

Indicate if the application supports reporting on inquiry-related statistics, including:

Total number of open inquiries

Total number of open inquiries, per department

Total number of open inquiries, per agent

Total number of open inquiries of type "x" (e.g., overdue, urgent or cancelled)

Total number of open inquiries of type "x" (e.g., overdue, urgent or cancelled), per department

Total number of open inquiries of type "x" (e.g., overdue, urgent or cancelled), per agent

Total number of inquiries processed per unit time

Total number of inquiries processed per unit time, per department

Total number of inquiries processed per unit time, per agent

Overall response time statistics

Overall response time statistics, per department

Overall response time statistics, per agent

Average response time statistics

Average response time statistics, per department

Average response time statistics, per agent

CRM RFP Pro Forma Requirements Template for Customer Service and Support

Indicate if the application provides performance statistics on a per agent basis, including the following:

Average elapsed time per inquiry

Maximum elapsed time per inquiry

Minimum elapsed time per inquiry

Percentage of inquiries closed within a specified period of time

Percentage of inquiries escalated or handed off

Total number of inquiries handled hourly

Total number of inquiries handled daily

Total number of inquiries handled weekly

Total number of inquiries handled monthly

Average number of inquiries handled hourly

Average number of inquiries handled daily

Average number of inquiries handled weekly

Average number of inquiries handled monthly

Does the application provide statistics pertaining to organizational performance?

Indicate if the application provides the following performance statistics:

Percentage of calls closed within specified parameters

Percentage of calls closed within specified periods of time

Percentage of calls closed within specified time parameter per designated tier

Total number of inquiries handled hourly per department

Total number of inquiries handled daily per department

Total number of inquiries handled weekly per department

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Total number of inquiries handled monthly per department

Average number of inquiries handled hourly per department

Average number of inquiries handled daily per department

Average number of inquiries handled weekly per department

Average number of inquiries handled monthly per department

Automatically calculate the total cost to the customer associated with an inquiry (i.e., from total time spent, hourly rates or cost of parts)

Does the application support analysis of quality assurance records to identify trends?

Does the application track and generate reports on common complaints?

Does the application report on the number of inquiries satisfied by the initial support tier?

Does the application report on the number of inquiries that were satisfied by additional support tiers?

Does the application report on inquiries or service requests submitted via a Web site or the Internet?

Does the application allow reopened records to be reported on separately?

Does the application support reporting on the number of reopened records for a defined period of time?

Indicate if the application allows reports to be generated on quality assurance-related information, including:

Track resources invested in resolving incidents

Track work assignments associated with resolving incidents

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Track period of time required for resolving incidents

Track resources invested in implementing enhancement request

Track work assignments associated with implementing enhancement request

Track period of time required for implementing enhancement request

Indicate if the application supports the following job-costing capabilities:

Track hourly rate for service agents

Track hourly rate for other employees by type or grade

Track cost of services, parts and calls. Specify in comments.

Call costing by station and by department or when using multiple long-distance service providers. Specify which in comments.

39.0 Data Collection and Output Support for Analyzing Call-Center Activities

Data Collection and Output Support for Analyzing Call-Center Activities

Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Indicate if the application supports the ability to integrate telephony data (e.g., how long customer was on hold or how many transfers were required) integrated with business data (e.g., result of call and profile of customer). For example, users want to cross reference IVR.

Indicate if the application supports gathering data from all system elements for integrated reporting of call-center activities, including: switches, servers, applications, databases, IVRs and Web sites. Please indicate which in comments.

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Indicate if the application creates a historical record for each call that enters the center to final hang-up This includes when the call is transferred, conferenced or sent to another location.

Indicate if the application supports a variety of outputs, including:

Displayed electronically on a screen

Printing to a local printer

Embedded in an e-mail distribution

Published to an Internet, intranet or extranet

40.0 Field Service Dispatch — Service Contracts and Billing

Field Service Dispatch — Service Contracts and Billing	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support tracking components by serial number

Does the application support tracking components by owner, location and warranty

Does the application support updates from sales and service activities

Does the application track items on shipment

Does the application support tracking field service contracts

Does the application support tracking contractual issues, including:

User-defined contract types

Service contract customer code

Service contract/warranty numbers

Renewal and expiration dates

Contract coverage types

Contract cost, terms and conditions

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User-defined services (e.g., labor, parts or expense coverage) with percent responsibility limits

Service contract limits tracking

Contract activity: phone support, field repair and maintenance

Contract quote letters

Deferred revenue reports

Scheduled service calls as item of contract

Customer credit checking and holds

User-defined billing cycles

Automatic service contract release for invoicing

41.0 Field Service Dispatch — Service Call Management

Field Service Dispatch — Service Call Management	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support customer site identification and call dating?

Does the application support identifying equipment breakdowns remotely monitored by service center?

Does the application support call queue management options?

Does the application support user-defined call priority sequencing?

Does the application support call routing and prioritization?

Does the application support use of urgency/deadline code?

Does the application support call escalation?

Does the application support customer downtime, running hours log?

Does the application support customer service representative assignment?

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Does the application support call activity/service deferral, cancellation?

Does the application support internal service requests to note action required for certain products?

Does the application support service order generation?

Does the application support service/repair kit orders?

Does the application support items allocation to service orders: manual and automatic?

Does the application support order allocation adjustment?

Does the application support order de-allocations: manual and automatic?

Does the application support generation of repair and service items list for service calls?

Does the application support equipment identification: product number, revision level and serial number?

Does the application support reporting by contract type, product and failure codes?

Does the application support service bill of materials and routings of standard repair sequences and support process?

Does the application support service order status inquiry?

Does the application support mean time between failures to repair reporting?

Does the application support failure and repair codes?

Does the application support multiple problems by failure code?

Does the application support the ability to have multiple solutions delivered by repair code?

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Does the application track billable mileage, travel time, repair and administration costs?

Does the application track material usage by stocking source?

Does the application track billing for service charges and replacement items?

Call detail: labor, expenses, material usage, failure reason and repair performed?

Call close?

Service call/order invoicing?

Call invoice detail by call number?

42.0 Field Service Dispatch — Field Service History

Field Service Dispatch — Field Service History	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application provide a report on all field service activities?

In providing an audit of field services, does the application track the following:

Shipment history by customer/product

Engineering change interface track revisions by serial number

Serial number/engineering change order level cross-reference

Serial number/service agreement tracking

Customer/product cross-reference reporting

Customer service agreement/contract number

Service type codes

Warranty number and expiration date tracking

Serial number tracking

Serial number/warranty cross-reference to check active warranties

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Field service/call activity reporting

Model/serial/number, assembly level serviced

Equipment type code

Failure type code

Location code

Repair code

Customer purchase order number

Field sales office

Date serviced

Field engineer employee code

Charges: estimate and actual

Time of service

Replacement serial/engineering change order data

Service/engineer activity reporting

Mean time between failure reporting

Product failure reporting by type/engineering change order level

Field service, A/R interface for invoicing

Field service inventory tracking

Does the application support an electronic checklist to monitor performance of field service personnel?

Does the application support reporting on number of instances of tardiness?

Does the application support reporting on number of absences?

Does the application support the ability to conduct customer satisfaction surveys?

CRM RFP Pro Forma Requirements Template for Customer Service and Support

43.0 Returns and Repair Capabilities

Returns and Repair Capabilities	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support a returns process?

Return material authorization (RMA) issue

RMA number assignment

Replacement item issue and shipment

Return to supplier (RTS) processing

Coverage percentages by; item type (items, labor and travel)

Does the application suite support a system for tracking good returns and credits?

System provides online goods returns entry and amendment by customer service staff.

Does the application suite maintain customer serial number data for returns?

Does the application suite maintain reason codes for returns?

Does the application suite validate parts entered as returnable or non-returnable?

Does the application suite validate against line value criteria?

Does the application suite override validation in some circumstances?

Does the application suite authorize returns based on user defined rules?

Does the application suite support a complete reversal of a given order number?

Does the application suite support a complete reversal of a given invoice number?

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Does the application suite verify that the quantity returned does not exceed quantity shipped?

Does the application suite validate against order line returnable/non-returnable flag?

Does the application suite support return goods authorization with a unique RGA number?

Does the application track customer/dealer returns?

Does the application support user-defined hold conditions?

Does the application support automatic exception checking and hold based on user defined controls?

Does the application user define hold codes?

Does the application hold by order line?

Does the application hold for all orders?

Does the application support credit holds?

Does the application support user-defined system impacts of hold codes on inventory reservation and shipment?

Does the application support held-over review action reporting?

Does the application support release queues?

Does the application support authorization releases by order line?

44.0 Field Service and Dispatch Information Processing via Handheld Devices

Field Service and Dispatch Information Processing via Handheld Devices	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support having information on field service and dispatch activities conveyed to or captured from handheld devices (e.g., personal digital assistants, smart phones or industry specific equipment)?

Does the application support the ability to make available information accessible to handheld devices pertaining to the following:

Client issues?

Complaints?

Market research?

Campaign briefs?

Customer feedback?

Callbacks?

Carryovers?

Service escalations?

Households?

Multi-dwelling allotment issues?

Geographical terrain?

Address issue?

Location of client?

Product and pricing information?

Corporate policies?

Contractual information?

Does the application support a memo facility to enable communication between functional areas concerning field service issues, including:

Client issues?

Complaints?

Market research?

Campaign briefs?

Customer feedback?

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Callbacks?

Carryovers?

Service escalations?

Households?

Multi-dwelling allotment issues?

Geographical terrain?

Address issue?

Location of client?

Product and pricing information?

Corporate policies?

Contractual information?

Does the application support the ability to provide calendar and task management features on handheld devices?

Does the application support the ability to flag customer commitments made?

Does the application support conveying voice and visual electronic data to handheld devices?

Does the application support the ability to download information in real time?

The vendor's application supports the following capabilities from a remote/mobile client:

View and check the status of inquiry entries

Open, edit and close inquiry entries

Search for inquiry entries

Sort inquiry entries

Perform problem resolution with a knowledge engine

Information entered by agents is immediately accessible by other agents

Does the application support point of service voice recording capabilities?

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Does the application support use of electronic forms on mobile handheld devices?

Does the application support scanning capabilities to manage inventory?

Does the application allow the receipt of payments via a mobile payment system for credit cards or direct debits at the point of service or sale?

Does the application support the ability for field service resources to receive upgrade orders, and participate in up-selling or cross-selling opportunities?

Does the application record up-selling or cross-selling activities by field resources and calculate incentives or monetary rewards?

Does the application support the ability for users to accept signatures electronically?

Does the application support direct communications between the call center and the field resource, whether directly employed or contracted?

Does the application support the ability for alerts concerning availability of field resources to be communicated to the call center? The call center can then make alternative arrangements or reset expectations of the customer.

Does the application support the ability to ascertain the location of a technician via a global positioning system?

Does the application support integration between handheld devices and call center that permits monitoring contracted resources?

Does the application support mapping capabilities on handheld devices (e.g., provide maps of Canada graphically depicting the location of dispersed field resources)?

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Does the application enable commendations to be sent to handheld devices of remote field resources?

45.0 Dispatch Support and Follow-up Activities

Dispatch Support and Follow-up Activities	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support engineering assignment and alternate selection?

Does the application support engineering scheduling based on user-defined priorities?

Does the application support visibility with contractor arrangements or partnerships?

Does the application support the ability to access and review data to measure the performance of contractors or partners?

Does the application support automatic calls to engineer's pager?

Does the application support project administration capabilities, including the ability to record the progress of any given project?

Does the application support the ability to establish alerts to notify the organization of any necessary follow-up action items that might be required?

Does the application support a repository of information households, properties, structures and dwelling types to be conveyed to dispatch resources?

Does the application support the graphical display of all data accessed?

Does the application support the ability to store contingency plans in case of the absence of designated field resources?

Does the application support the ability to determine lack of availability of field resources?

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Does the application support a dispatch system that can intelligently provide options, descending from optimal option to next option?

Does the application support a dispatch system that automatically logs a new job when a scheduling option has been determined?

Does the application support a repository of route information?

Does the application support the ability to model best possible route for dispatching field resources? For example, provide the best route from address A for one job to address B for the following job?

Does the application support integration with an ordering system?

Does the application provide dispatch personnel an interface to both record an order and dispatch field resources?

Does the application allocate jobs based on listed skills?

Does the application support a dispatch system that tracks instructions communicated to field resources and determines level of compliance?

Does the application support alerts to field managers or dispatch personnel within a call center of noncompliance of field resources with instructions?

Does the application support the ability to prioritize work orders based on the following:

Customer profile?

Job type?

Does the application support the ability to re-route work orders to different field resources if it is determined one field service team is inappropriate for the job?

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46.0 Inventory Management

Inventory Management	Current Version, Functionality	GA OOB	Configured	Through Partnership	Future Version and Date	Comments
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Does the application support service engineer orders of parts for calls, inventory replenishment, item expense?

Does the application support allocation item picking?

Does the application track inter-warehouse transfers for material field dispatch?

Does the application support the conduct of a physical inventory?

Does the application support cycle counting?

Does the application support ABC cycle counting?

Does the application support XYZ cycle counting?

Is cycle counting controllable by:

Storage region

SKU

Is counting executed in real-time?

Is a non-real time, paper or CRT based form of counting supported?

Indicate which forms of real-time counting are supported:

Low limit threshold

Put away exception

Picking exception

Scheduled cycle count task, system directed

Operator initiated, impromptu count

Does the application support online inquiry capabilities?

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Does the system provide visibility to the following items:

Loads by SKU, total by status

Loads by location

Location with contents by load

Inbound orders

Outbound orders

Receiving reports

Waves, progress and status

Staging lanes

Docks

Does the system have audit trail capabilities:

By load

By location

By operator

By task type

By date/time range

Does the application provide the ability to do a corporate stock balance on request?

Does the application support the ability to examine trends across a category of merchandise and identify the items rising in demand and those declining in demand?

Does the application support individual customer delivery rules?

Does the application support splitting of deliveries?

Does the application support crisis/delivery information/splitting rules at item/delivery point level?

Does the application support multiple items/delivery points?

Does the application support processing of incoming cumulative/discrete quantities?

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Does the application support multiple shipments per day?

Does the application support delivery request releases by date or period?

Does the application support ability to activate/deactivate blanket orders?

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Appendix A: Acronym Key

ACD: Automatic call distribution

ANI: Automatic number identification

CASE: Computer-aided software engineering

CLI: Calling line identification

CSS: Customer service and support

DID: Direct inward dialing

DNIS: Dialed number identification service

EDI: Electronic data interchange

GA: Generally available

ISDN: Integrated Services Digital Network

IVR: Interactive voice response

LOB: Line of business

OOB: Out-of-box

RFI: Request for information

RFP: Request for proposal

SIC: Standard Industry Code

TIN: Tax identification number

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