

RUTHERFORD

ADVISORY GROUP, LLC

320 E. Buffalo St., Suite 605
Milwaukee, WI 53202

Phone: (414) 571-2245
E-Mail: info@rutherfordadvisors.com
Web: www.rutherfordadvisors.com

March 3, 2006

Overview

The Rutherford Advisory Group is currently working with a non-profit organization in Madison, WI to determine the best telephone system for their current and future needs. This non-profit has grown dramatically over the past two years from 50 office-based employees to 100 employees. Their current system, a Merlin-Legend, has reached capacity and they expect growth to 200 office-based employees within the next 2 years. The organization is building a new office-building which they plan to occupy within the first two months of 2004. Cabling will be provided by a 3rd party for both voice and data.

Bidding Criteria

All companies bidding on this project will be judged by standardized criteria. The following is the basic criteria used while judging your proposal:

- ◆ Professional quality and completeness of proposal
- ◆ On-time receipt of the proposal
- ◆ Number of years in business
- ◆ Number of available technicians
- ◆ Telephone systems supported (including systems not part of the bid)
- ◆ Technician certification for supported systems
- ◆ Guaranteed response time
- ◆ Average response time
- ◆ Availability of service (please list all options and various pricing if applicable)
- ◆ Additional products and services offered
- ◆ Upgradeable features of the system quoted
- ◆ Availability of support from separate vendor
- ◆ National support for the telephone system
- ◆ Training options both prior to installation, during, and after installation

Please keep in mind that only written proposals will be accepted for this bidding. No in-person meetings* will be available so please make your proposals complete, detailed and professional as possible. Please provide 3-5 references with your proposal as well, preferably for the phone system you are quoting or a similar phone system.

*If several professional proposals are received with no clear "winning" bid, in-person meetings may be scheduled to make a final decision.

Required System Features

Within your proposal, please make it clear how your proposed telephone system meets each one of the requested features. If any of these requirements have options, please include all options, costs of each option, and an explanation of the different options.

System Features

- ◆ DID, Caller ID compatible – We will make sure the proper telecommunications are in place for these features to work properly.
- ◆ Automatic Call Distribution – At first there is no reason for incoming calls to use this feature but there are immediate needs to customize internal calls (i.e., dial an extension, get a group, etc.)
- ◆ Call queuing for call groups – Some customer service groups receive many calls at once. The ability to queue these calls with a custom message is imperative.
- ◆ Customized Paging throughout building using speakerphones. May also wire in 1-way speaker-only for outside areas or rooms with no telephone sets.
- ◆ Call recording options – Please be detailed as to how this works, extra pricing for this feature, and how recorded conversations can be removed from the system
- ◆ Call reporting – Require the ability to record any and all details for incoming calls, outgoing calls, inner-office calls, features on or off (such as do-not-disturb, call forwarding, etc.) as well as specific data for long-distance calls, per user, not per phone (open to dialing codes but would rather have users “log in” to system via a 4-5 digit code). Please describe the ease of retrieving data and what software is required for running queries, etc. Please detail all options and related costs.
- ◆ VoIP – There is currently no functional necessity of this feature but the phone system needs to be upgradeable or compatible with VoIP. Please notate related costs for future upgrades.
- ◆ Side car (or equivalent) for reception – As the organization is growing and growing, the front-desk receptionist will require additional abilities to manage incoming calls. With 200 potential extensions, having a button on a side car for each extension is not practical. Please detail ways that your system can track all extensions from a single location without a separate button or LED for each extension. Computer integration is acceptable and encouraged.
- ◆ Customizable auto-attendant
- ◆ Parking callers as well as putting callers on hold
- ◆ Internal phone-to-phone “camping” or equivalent.
- ◆ 900# blocking and the ability to add additional area codes or exchanges—please give detail if your system allows customization of call-blocking per person or per group.
- ◆ Do not disturb – Please mention all customizations of this feature per user or per group. The organization has some “problem” people who use this feature more often than they should. Please detail if DND can be programmed for a certain time-period or taken off after a certain amount of time by the system itself.
- ◆ Day and night messaging – The current system is difficult to administrate day and night messaging. Please give information regarding your system’s ability to change phones from day messages to night messages as well as holiday messages.
- ◆ Sending group voice mail without dialing each extension. For example, sending a message to a certain extension will send voice mail to everyone in a pre-determined group.
- ◆ Good increments for ringer volume. Current sets go from zero to loud with one notch.
- ◆ Speed dial – customizable for each user or company-wide
- ◆ Different rings for internal calls vs. external calls
- ◆ Conference calling capacity for up-to 3 outside lines at once.
- ◆ Ability to retrieve saved voice mail off of the system and convert it to a standard file (WAV or MP3, etc.)
- ◆ Ability to pick up someone else’s extension when their phone rings but they are away from their desk.

Special Needs

Some employees of this non-profit have impairments that make standard telephone systems a challenge to use. While not having a solution for the following requirements will not count against you, having some solutions will count for you. Please review the following special needs and incorporate your ideas within your proposal.

For the hearing impaired:

- ◆ Sets that have flashing lights instead of/or along-with ringing.

Touch related features for the site impaired. Please indicate options and pricing for each of these challenges:

- ◆ The hold button – Currently the hold button is useless as users cannot see which line held calls are on.
- ◆ Do Not Disturb button – Not knowing if this feature is on or off impedes incoming calls.
- ◆ Cordless Headset – Sight impaired users require a headset for their computer and for their telephone. This gets challenging as users not only require the ability to listen to the telephone conversation but also need to be able to hear their computer reader. At worst, a cordless headset for both, but if you have a solution that meets both of the needs, please include it within your proposal.
- ◆ Flat or “digital” buttons – These buttons are difficult to use as they “blend” into the surface of the phone. Raised buttons are preferred so that each button can be distinguished from the other.
- ◆ More rings before sent to VM – Most people will want 3 rings before the call is transferred to voice mail but site-impaired users will want the option to have more rings. Is it possible to have a certain phone programmed for more rings than other sets?
- ◆ No visual prompting – Any feature on the phone that relies on visual prompting of some sort needs to be reconfigured.

Special Considerations

Faxing

While this should not make a difference to the phone system, you should be aware that future plans for the company are to incorporate desktop faxing into the computer system. The exact details have not been worked out but will probably incorporate DID with a server based faxing software that will drop incoming faxes into a user's Exchange mailbox. Please make sure your system will work with this future solution.

Multiple Locations

While there is one physical location for the organization right now, the organization anticipates having 5-10 locations within the next few years. Each remote location will have 6-8 people. The phone system will need to integrate with the remote locations as one complete system.

Training

Please pay as much attention as you possibly can explaining your available training options. Because this will be a new telephone system in a new building, some users should be able to receive hands-on training at the new building prior to the cutover date. Please indicate what training materials you offer, how you plan to train prior to the installation, how you plan to be available for training after the cutover date, and any ongoing training you provide.

System Details

This system requires 100 users when it goes live. However, if price permits, the entire 200-person telephone system may be purchased at once. Please indicate the following pricing:

Voice Mail

Pricing for 100, 120, 150, 175, and 200 users.

Sets

Please quote for display phones and non-display phones (if applicable).

Pricing for 100, 120, 150, 175, and 200 users.

Please quote for 5 and 10 display phones.

Please quote for a reception system that will allow access to the status of all 200+ extensions at once. This may integrate with the reception computer system.

Please quote for 24 corded headset and 3 cordless headsets.

Telephone Lines

Please plan for adequate telephone capacity for 100 to 200 users. Please estimate the number of T1 lines required for 100, 120, 150, 175, and 200 users.

Several fax machines will be used and will require compatible lines. Please plan for 5 "analog" compatible lines.

Several standard computer modem line will be needed as well. Please plan for 5 "analog" compatible lines.

There is one TTDY phone that needs to be incorporated within this phone system. Please account for any technology requirements of this phone.

Backdoor Lines

In case of a digital failure, it would be best if some analog backdoor lines were available. Please indicate any extra pricing for accommodating analog lines and the details for accessing those lines.

Maintenance Contracts

Please indicate all of your maintenance contract options, the benefits of each option and each option's price.

Remote Monitoring

Please indicate if your company offers remote monitoring of the telephone system, what is monitored, how it is monitored, and its related pricing.

Non-Profit Considerations

Many manufacturers offer discounts or price-breaks to non-profit organizations. If you require non-profit information such as tax ID numbers, physical information, or anything else, please find a way to work around these requirements. The organization wishes to be left out of the bidding process at this point. If you are the winning bidder, you will receive all pertinent information at time of proposal signing.

Submitting Bids

Bids will only be submitted to the Rutherford Advisory Group. You may e-mail or postal mail your bid.

Early Bids – Bidders submitting their bids prior to the due-date receive special treatment. All bids will be reviewed prior to the due date and you will be given the option to revise any questionable bids. Revised bids must be received by the official due date.

Due date – Bids are due in full by 5:00pm of the due date. One copy of your bid needs to be submitted, multiple copies are unnecessary.

Early bid due date: August 6th.

Official due date: August 11th.

Mailed bids must be sent to:

Rutherford Advisory Group, LLC
320 E. Buffalo St., Suite 605
Milwaukee, WI 53202

E-mailed bids must be sent in MS Word format to:

timr@rutherfordadvisors.com

Please indicate “Bid for project 5150-1013” on your submission.

Winning Bidders

Winning bidders will be notified via telephone of their winning bid. Pre-installation meetings with the winning bidder will begin soon-after notification.

Questions

All questions stemming from this proposal request must be directed to:

Tim Rutherford
414-571-2245

or e-mail

tim@rutherfordadvisors.com

The organization being represented does not wish to be questioned at this time. Tim Rutherford will act as the proxy for any questions that require an answer from the organization.

Conclusions

Thank you for your time in this bidding process. All submitted bids will be judged by the same standards listed on page 1 of the document. No prior affiliations exist nor judgements have been made by Rutherford Advisory Group, LLC or the organization being represented in this RFP.