REMOVE THIS PAGE BEFORE ISSUING THE RFP TO A VENDOR

LEGAL DISCLAIMER

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TECHNOLOGY BROKERS

We are CoreTech Brokers, a technology brokerage specializing in Microsoft-related solutions. We work just like insurance brokers, but with technology. We are paid by the service providers we represent. We are a value-added service that costs your company nothing. We add value through bringing you service provider choices, pre-contract consulting and support, project implementation coordination, post-sales service and billing escalation. We will manage this RFP process with you. If you have any questions about this document or the services that we offer, please contact us.

EASY RFP PROCESS

Our goal is to make the procurement process as easy as possible.

1. Simply review the RFP.
   a. You can do a search and replace on any information listed with "{info}" brackets.
   b. Add information, delete information, or reword information to meet your unique environment and business objectives.
2. Return the RFP to CoreTech Brokers.
   a. Define the minimum and maximum number of responses you would like to receive.
   b. We will source service providers to respond to the RFP.

Request for Teams Cloud Voice Proposal

Version 1.0
{date}

Authorized Technology Broker:

Greg LaCoste
480.320.3370
greg@coretechbrokers.com

Clark Atwood
480.320.3330
clark@coretechbrokers.com

SERVICE PROVIDER CONTACT INORMATION

Thank you for responding to our Request for Proposal. Please use this document as a guide and follow the instructions contained herein. <u>Questions should be directed to the Sales Representatives.</u>

The proposal must include a list of project team members, including technical staff, available for servicing the solution including the customer premises (if applicable), during and after the installation.

{Client Name} desires to service provider retain the same key personnel assignments, including Vendor Project Manager and Software Engineer(s) for 12 months following the first order. Any unavoidable changes in key personnel must be communicated to {Client Name} in writing with as much advanced notice as possible.

Company Name	Date Company Started	Current Number of Employees
[Vendor's Legal Name]	[Date]	[Number]
Sales Representatives	**Support Representative**	**Management Representative**
Greg LaCoste 480.320.3370 greg@coretechbrokers.com Clark Atwood 480.320.3330 clark@coretechbrokers.com	[Name and Contact Information]	[Name and Contact Information]
Project Manager	**Sales Engineer**	**Other**
[Name and Contact Information]	[Name and Contact Information]	[Name, Title, Role, and Contact Information]

RFP – Teams Cloud Voice

This RFP is provided to you for your company's evaluation. It is <u>confidential and proprietary</u> and should not be disseminated outside of your organization without prior written permission of {Client Name} and CoreTech Brokers. Should you decide not to respond to this request, please destroy all copies of this document immediately.

We invite your company to review the RFP and determine if your company would like to respond as a potential provider of the products and services outlined below.

Non-Disclosure Requirements

This document is bound by the terms and conditions of the non-disclosure agreement signed by both Vendor and {Client Name}. By accepting this document, you and your company acknowledge the confidentiality of the information contained herein, referenced by, or attached to, and agree to the confidentiality terms and conditions of the non-disclosure agreement including the immediate destruction of this document and all related information, and written confirmation of such action, should you not wish to bid on the RFP, are not invited to continue in the RFP process, or are not the winner of the RFP.

Right of Selection/Rejection of Proposals

{Client Name} reserves the right to select a proposal for Teams Cloud Voice and equipment through negotiations. {Client Name} reserves the exclusive right to select, or reject, any or all proposals for any reason, to waive any informality in the proposals received, and to waive minor deviations from the specifications. {Client Name}'s waiver of any informality or immaterial deviation shall in no way modify the RFP documents or excuse the Vendor from full compliance with the RFP requirements. Selection of a Vendor as the apparently successful vendor shall not be construed as an award of a contract but as the commencement of contract drafting, discussions and negotiations. {Client Name} may select an apparently successful vendor based on information in addition to that received in a proposal. It is emphasized that all proposal responses should be complete and submitted with the most favorable financial terms.

{Client Name} specifically reserves the right to reject the proposal of any Vendor who submits false, incomplete, non-compliant proposal response, or unresponsive statements in its proposal.

Overview

{Client Name} has requested that CoreTech Brokers compile requirements and solicit proposals and pricing for a Teams Cloud Voice solution.

Client is engaged in the business of {Client business description}.

{Client Name} has a {target market description}.

{Client Name} has a goal of {future business targets or goals}.

RFP Process

Complete Your Responses

Responses to this RFP require that response information be put into this RFP template. Submissions that do not conform to this template will be discarded and not reviewed. {Client Name} will however, allow a submission where specific, clear references are given, within the format of the RFP, external, or supplemental materials submitted with the response. This is intended to allow the prospective provider to submit information already organized in its own format.

Incorporation of RFP and Proposal in the Final Agreement

This RFP and the Vendor's proposal response, including all promises, warranties, commitments, and representations made in the successful proposal, shall be binding, and be included in {Client Name}'s contract with the Vendor.

Errors in Proposals

If discrepancies between sections, or other errors are found in a proposal response, {Client Name} may reject the proposal; however, {Client Name} may, at its sole option, correct any arithmetical error in extended price calculations or the addition of line items. Vendors are responsible for all errors, or omissions, in their proposal responses. Any such errors or omissions will not serve to diminish their obligations to {Client Name}.

Cost of Development of Proposals

All expenses incurred by Vendors related to the proposal response or the selection process will be borne by the Vendor. No claim for reimbursement of time, material or travel expenses shall be made by the Vendor against {Client Name} or its agents, regardless of the results of the selection process. If it is in the best interests of {Client Name's} business needs, {Client Name} reserves the right to cancel the entire RFP process and assumes no responsibility for any associated Vendor costs related to responding to the RFP.

Proposal Disposition

All materials submitted in response to this RFP shall remain the property of {Client Name}.

Non-Collusion

The Vendor certifies that his/her firm has not entered into any agreement of any nature whatsoever to fix, maintain, increase, reduce prices or competition regarding the items covered by this Request for Proposal.

Codes and Standards

It shall be the responsibility of the Vendor to identify all codes, and/or agencies having jurisdiction and governing the execution of this proposal and to insure conformance with those codes and agencies. At a minimum, the execution of this RFP and all acts of the Vendor selected to perform work described herein, shall conform with and/or follow the applicable guidelines, rules, regulations and statutes of all state, federal and local agencies.

Evaluation Criteria and Process

{Client Name}, with the assistance of its independent consultant {Broker}, will evaluate proposals based on how well the proposal meets the needs of {Client Name}, as determined by the proposer's response to the requirements defined in the RFP. {Client Name} reserves the right to make a final decision to procure the solution, which provides the best value in their opinion. This includes a combination of functional and technical features, risk avoidance and price.

A selection may be made based on the proposals. Alternatively, the evaluation team may create a short list of the top ranked vendors and invite them to conduct a presentation, product demonstration and provide products and service for a 30-day evaluation. {Client Name} expects vendors to demonstrate the latest generally available versions of the systems and software that comprise the proposed solution. If, however, a vendor is proposing to install a later (pre-announced) release or an older (previous release) version, this must be clearly communicated and explained in the response.

[Please give a brief description of your Teams Cloud Voice architecture. Possibly include diagrams.]

Project Description

{Client Name} is seeking a solution for connecting and managing PSTN connectivity to Microsoft Teams.

NOTE: If your company does not support {critical component[s] of the solution}, you are encouraged to submit a no-bid response and destroy this RFP.

Support

Please describe in detail your customer support model program including support hours.

Please clearly define {Client Name} support responsibilities with employees and what resources are available from your company to support employee issues beyond {Client Name} responsibility.

Please describe your support structure and escalation processes. Include in your description if support personnel are employed by your company, or if outsourced, their physical state, or country where they reside.

Network Support Requirements

Please describe the network support requirements for the solution proposed in this document.

Feature Requirements

The following features are required. Please provide a detailed short description of each:

- Number Porting
- Toll Free RESPORG changes
- E911
- Call Detail Reporting
- Voice Conferencing
- Web Conferencing
- Receptionist console and side cars
- At-home Workers
- Voicemail to Email
- Electronic Fax
- SMS
- Conference Rooms

- Analog replacement – {Client Name} prefers not to use analog lines. Please describe your best practice for analog fax machines, credit card machines, alarm systems and elevators, other equipment, including alternatives to analog (POTS) lines.

Contact Center

This proposal (does / does not) include requirements for a contact center solution.

(Clients should contact CoreTech Brokers for the contact center solution portion of this RFP should you wish to include contact center requirements. – REMOVE THIS BEFORE PUBLICATION)

Additional Feature Requirements

Please include any additional features you feel are required to successfully deploy or use your Teams Cloud Voice offering.

The following features are also requirements. Please provide a response if you are, or are not, able to provide this feature and any additional costs.

- {Additional requirements such as software integration}

Equipment, Installation, and Maintenance

Handsets and Softphone Usage

Physical handsets {are or are not required – provide details of where any handsets are needed and their use}

{Client Name} intends on using the Teams application on desktop, laptop, and mobile devices.

Equipment Procurement

Does your company offer the required equipment in this proposal for sale, lease, or rent? Please describe.

Installation and Maintenance

Please describe whether your company conducts a site survey prior to installation.

What are your standard scheduled system maintenance windows?

How does your company handle non-scheduled system maintenance?

How does your company keep pace with Microsoft changes, testing, and rollouts?

Please describe how your company monitors and troubleshoots your network and systems.

Please describe the redundancy within your network and systems.

Please identify any single points of failure in your network, architecture, or solution delivery.

Please describe all the training available that may be utilized under an agreement with your company.

Please include any additional information you feel needs to be understood by {Client Name} to successfully install and maintain the services of your Teams Cloud Voice offering.

Teams Cloud Voice Pricing

Hardware Pricing

If providing equipment, please provide purchase and leasing options. Please include the warranty, extended warranty, and replacement options.

Seat / Service Pricing

Please provide the service pricing for your Teams Cloud Voice service including available terms, quantity discounts, promotions, and incentives. Apply any appropriate GPO, non-profit, or other discounts to your pricing and notate the price change or discount.

Other Service Pricing

U.S. Long Distance (if any charges)

Toll Free Service

Please include an International Rate Table

Directory Listing

DID numbers

- Active
- Parked

Other costs not described above.

Company Information and References

Financing and Company Overview

Please describe your company's financial position including primary investors/owners.

Is your company ownership publicly held and traded?

Are your principal investors other companies, venture capitalists, angel investors, or others?

Please describe what assurances, if any, can be given to {Client Name} for pricing and support that will survive a sale of your company to another company or future investors.

Please provide an overview of your top-level executives and a short description of their management experience.

Please describe your organization including:

ITEM	DESCRIPTION
Number of employees	
Number of support personnel	
Number of customers	
Size of largest customer and geographical coverage	

Please provide at least three references of companies that have at least {Client's number of employees} on your platform.

COMPANY	CONTACT INFORMATION
(Company Name) Industry: Approx # of Employees: Technology Description:	(Name) (Title) (Phone) (Email) Best way, days of the week, and times to reach this person:
(Company Name) Industry: Approx # of Employees: Technology Description:	(Name) (Title) (Phone) (Email) Best way, days of the week, and times to reach this person:
(Company Name) Industry: Approx # of Employees: Technology Description:	(Name) (Title) (Phone) (Email) Best way, days of the week, and times to reach this person:

Response Requirements

Return Your Response

An email copy must go to the following individuals:

NAME	TITLE	EMAIL
Clark Atwood	Independent Technology Broker	clark@coretechbrokers.com
Greg LaCoste	Independent Technology Broker	greg@coretechbrokers.com

Questions

Questions and inquiries stemming from the RFP will be disseminated to all other respondents, along with the corresponding answers. To submit a question or make an inquiry, please email:

NAME	TITLE	EMAIL
Clark Atwood	Independent Technology Broker	clark@coretechbrokers.com

RFP Timeline

Deadline for Submission - The deadline for submitting a response to this RFP is **{date and time}.**

Deadline for Initial Questions - The deadline for submitting initial questions or inquiries for this RFP is **{date and time}.**

Internal Evaluation Period – **(1 – 90 days) after the deadline for submission.**

Notification of Interview or Termination of the RFP process - **(1 – 90 days) after the Internal Evaluation Period.**

Interview Process - **(1 – 90 days) after Notice of Interview.**

Internal Selection Period – **(1 – 90 days) after the completion of Interviews.**

Anticipated Award of RFP Winner - **{date and time}.**