



**HISYNERGY**

## **CCaaS RFP Template**

A structured framework for evaluating  
Contact Centre as a Service platforms

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## Introduction

Selecting a Contact Centre as a Service (CCaaS) platform is one of the most consequential technology decisions an organisation will make. The platform you choose will shape how your customers experience your brand, how your agents perform their roles, and how your operation scales over the coming years. A poorly structured procurement process can result in misaligned capabilities, unexpected costs, and a platform that fails to meet your needs within months of deployment.

This RFP template provides a structured framework for evaluating CCaaS suppliers in a consistent, comparable way. It is designed for organisations of all sizes that are considering a move to a cloud contact centre platform, whether replacing a legacy on premise system, migrating from one cloud platform to another, or deploying a contact centre capability for the first time.

The template covers every critical area of a CCaaS evaluation: from core platform capabilities and omnichannel requirements through to AI and automation, workforce management, integration, security, migration planning, and commercial terms. By issuing a standardised set of questions to all prospective suppliers, you create a level playing field that makes objective comparison possible.

Each section includes specific questions and prompts that you should tailor to reflect your organisation's priorities, technical landscape, and operational model. No two contact centre operations are identical, and your RFP should reflect the nuances of your environment. We recommend removing questions that are not relevant to your requirements and adding any that address specific challenges or objectives unique to your organisation.

If you would like independent, supplier agnostic support with your CCaaS procurement, from defining requirements through to supplier evaluation and selection, HiSynergy Consulting can help. Visit [www.hisynergy.co.uk](http://www.hisynergy.co.uk) or contact us at [hi@hisynergy.co.uk](mailto:hi@hisynergy.co.uk) to discuss your project.

## Section 1: Organisation Overview

Please complete the following to give prospective suppliers an understanding of your organisation and contact centre operation.

1. Organisation name
2. Industry sector
3. Registered address and primary contact centre site locations
4. Key contact for this RFP;
  - Name
  - Role
  - Email address
  - Telephone number
5. Brief description of your organisation and the products or services you offer
6. Total number of contact centre agents (full time equivalent)
7. Number of contact centre sites (include any home or hybrid working arrangements)
8. Customer channels currently in operation (e.g. voice, email, webchat, social media, SMS, video)
9. Approximate monthly inbound interaction volumes, broken down by channel where possible
10. Core operating hours, including any out of hours or 24/7 requirements

## Section 2: Current Environment

Please provide details of your current contact centre technology landscape to help suppliers understand your starting point and any migration considerations.

1. Current contact centre platform;

Supplier

Product name

Version

Deployment model

2. Current contract end date and any notice period or break clause details

3. Current telephony provider(s) and SIP trunk or PSTN arrangements

4. CRM system(s) in use (supplier, product name, version)

5. Workforce optimisation and quality monitoring system currently in use

6. Workforce management system currently in use (if any)

7. Other key systems integrated with the contact centre (e.g. back office, ERP, knowledge base, payment systems)

8. Known pain points or limitations with your current platform

9. Key drivers for this procurement (e.g. contract expiry, capability gaps, cost reduction, modernisation, growth)

10. Any regulatory or compliance frameworks that apply to your operation (e.g. FCA, PCI DSS, GDPR, ISO 27001)

11. Current network infrastructure relevant to the contact centre (e.g. MPLS, SD-WAN, internet breakout arrangements)

12. Any previous CCaaS evaluations or migrations undertaken, and lessons learned

## Section 3: Requirements

The following questions form the core of this RFP. Suppliers should respond to each question in full, providing specific detail rather than generic marketing material. Where a capability is delivered through a third party integration, this should be clearly stated.

### 3a) Core Platform Capabilities

1. Describe the architecture of your CCaaS platform, including where the platform is hosted, how resilience and redundancy are achieved, and your published uptime commitment.
2. Describe your Automatic Contact Distribution (ACD) capabilities, including the routing methodologies supported (e.g. skills based, priority based, data directed, AI driven) and how routing rules are configured and maintained.
3. Describe your Interactive Voice Response (IVR) capabilities, including how IVR flows are designed, tested, and deployed. Confirm whether a graphical flow builder is provided and whether changes can be made by business users without supplier involvement.
4. Describe your call recording capabilities, including how recordings are stored, retained, searched, and retrieved. Confirm whether screen recording is available and how recording can be paused for PCI compliance.
5. Describe the real time and historical reporting capabilities of the platform, including the standard reports provided, the ability to create custom reports, and any data visualisation or dashboard tools available.
6. Describe how supervisors monitor and manage agent activity in real time, including live queue visibility, agent state monitoring, listen, whisper, and barge capabilities.
7. Describe how the platform handles peak demand and unexpected volume spikes, including any auto scaling capabilities and how additional capacity is provisioned.
8. Describe how the platform supports multi-site and multi tenancy configurations, including how different teams, departments, or business units can be managed within a single environment.

### 3b) Omnichannel Capabilities

1. Describe the customer channels natively supported by your platform (e.g. voice, email, webchat, SMS, social media, video, messaging apps) and confirm which are native to the platform versus delivered through third party integration.
2. Describe how your platform provides a unified agent desktop across all channels, including whether agents can handle interactions from multiple channels simultaneously and how channel context is preserved.
3. Describe how your platform manages channel switching within a single customer interaction (e.g. a customer who begins on webchat and escalates to voice), including how context and conversation history are maintained.



4. Describe your webchat capabilities, including proactive chat triggers, co-browse, file sharing, and how chat is routed and queued.
5. Describe how your platform integrates with social media channels, including which platforms are supported, how social interactions are routed to agents, and how public and private messages are managed.
6. Describe your email management capabilities, including how emails are routed, categorised, and prioritised, and how service levels are managed for email interactions.
7. Describe your SMS and messaging app capabilities, including support for WhatsApp, Facebook Messenger, Apple Messages for Business, and similar platforms.
8. Describe how your reporting and analytics capabilities work across all channels, including whether a single consolidated view of performance is available.

### **3c) AI and Automation**

1. Describe your conversational AI and virtual agent capabilities, including supported channels, languages, natural language understanding accuracy, and how virtual agents are built, trained, and maintained.
2. Describe your agent assist capabilities, including real time guidance, next best action recommendations, knowledge base surfacing, and automated after call work such as call summarisation.
3. Describe your intent recognition and sentiment analysis capabilities, including how these are applied in real time during live interactions and how they inform routing or agent guidance.
4. Describe your AI driven quality monitoring and scoring capabilities, including how interactions are automatically evaluated, what percentage of interactions can be scored, and how evaluation criteria are configured.
5. Describe how your platform uses AI to analyse customer interactions at scale, including speech and text analytics, trend identification, and root cause analysis.
6. Describe your chatbot and self-service automation capabilities, including how bots are designed, how handoff to a live agent works, and how bot performance is measured.
7. Describe your approach to AI transparency and governance, including how AI decisions are explained, how bias is monitored, and how your AI models are trained and updated.
8. Describe your roadmap for AI capabilities over the next 6 to 9 months, including any planned enhancements to generative AI, automation, or analytics.

### **3d) Workforce Management and Quality**

1. Describe your workforce management (WFM) capabilities, including demand forecasting, schedule generation, intraday management, and agent self-service for shift swaps and holiday requests.

2. Describe how your WFM solution handles multi skill and multi-channel forecasting and scheduling.
3. Describe your quality management capabilities, including evaluation form design, calibration, agent coaching workflows, and how quality scores are tracked over time.
4. Describe how your platform supports agent performance management, including scorecards, KPI tracking, gamification, and any tools that link quality, WFM, and performance data.
5. Describe how your platform supports agent training and development, including eLearning, knowledge base access, and integration with learning management systems.
6. Describe your adherence monitoring capabilities, including real time alerts for out of adherence agents and historical adherence reporting.

### **3e) Integration Requirements**

1. Describe the APIs available on your platform, including REST API coverage, webhook support, rate limits, and developer documentation.
2. Describe your standard CRM integrations, specifically confirming native integration with *[insert your CRM]*, including what data is exchanged and how screen pops are configured.
3. Describe your telephony and SIP connectivity options, including whether you provide native PSTN connectivity, support for bring your own carrier (BYOC) arrangements, and SIP trunk interoperability.
4. Describe how your platform integrates with back-office systems, workforce management tools, and other enterprise applications.
5. Describe any prebuilt integrations or marketplace connectors available, including the process for building custom integrations.
6. Describe your approach to single sign on (SSO) and identity management, including support for SAML, OAuth, and integration with Microsoft Entra ID (Azure AD) or similar identity providers.
7. Describe how data is exchanged between your platform and external systems, including data formats, frequency of synchronisation, and any middleware or integration platform requirements.

### **3f) Security, Compliance, and Data Sovereignty**

1. Confirm where customer data is stored and processed, including the geographic location of data centres and whether data residency within the United Kingdom or European Economic Area can be guaranteed.
2. List all security certifications and accreditations held (e.g. ISO 27001, SOC 2 Type II, Cyber Essentials Plus) and confirm when each was last audited.



3. Describe how your platform supports PCI DSS compliance for payment card handling, including whether pause and resume recording, DTMF masking, or secure payment IVR are available.
4. Describe your approach to data encryption, including encryption at rest and in transit, key management, and whether customer managed encryption keys are supported.
5. Describe your data retention and deletion policies, including how data is purged at the end of the contract and how data subject access requests under GDPR are handled.
6. Describe your business continuity and disaster recovery arrangements, including your Recovery Time Objective (RTO), Recovery Point Objective (RPO), and the frequency of DR testing.
7. Describe your approach to penetration testing, vulnerability management, and security incident response, including your notification process in the event of a data breach.
8. Describe how access controls are managed within the platform, including role based access, multi factor authentication, and audit logging of administrative actions.

### **3g) Migration and Implementation**

1. Describe your standard implementation methodology, including the key phases, typical timescales, and governance structure.
2. Describe how you approach migration from legacy platforms, including data migration (call recordings, historical reporting data, agent configurations), number porting, and cutover planning.
3. Describe your approach to user acceptance testing, including the testing environments provided and how defects are managed during the implementation phase.
4. Describe the training provided as part of the implementation, including training for agents, supervisors, administrators, and technical staff, and the formats available (classroom, virtual, eLearning, documentation).
5. Describe your approach to change management and stakeholder engagement during the implementation, including how you support organisations in preparing their teams for the transition.
6. Describe the resources and roles you expect the customer to provide during the implementation, including any technical prerequisites or infrastructure requirements.
7. Confirm whether you offer a phased or pilot deployment approach and describe how this would work in practice.

### **3h) Support, SLAs, and Service Management**

1. Describe your standard support model, including support hours, channels (phone, email, portal, chat), and any premium or enhanced support tiers available.
2. Provide your standard SLA framework, including target response and resolution times for each severity level.



- 3.** Describe how platform incidents are communicated to customers, including your status page, notification process, and post incident review procedures.
- 4.** Describe your approach to ongoing customer success, including account management, regular service reviews, and how you support customers in optimising their use of the platform.
- 5.** Describe your platform release and update process, including the frequency of updates, how customers are notified, and whether updates can be deferred or scheduled.
- 6.** Describe how feature requests and product feedback are managed, including your product roadmap governance and how customer input influences development priorities.

## Section 4: Commercial Model

Suppliers should provide transparent and detailed responses to the following commercial questions. All pricing should be provided in GBP excluding VAT.

- 1.** Describe your licensing model in detail, including what is included in the per agent licence fee, whether licences are named or concurrent, and how different agent types or roles are licensed.
- 2.** Provide a fully itemised pricing schedule for the solution described in your response, including all recurring, one off, and consumption-based charges.
- 3.** Confirm the minimum contract term and describe the options for contract renewal, extension, and early termination including any associated costs.
- 4.** Describe how your pricing scales as the organisation adds or removes agents, channels, or functionality, including any volume discount thresholds.
- 5.** Confirm what is included in the standard licence versus what incurs additional cost, specifically addressing: call recording storage, AI and automation features, workforce management, quality management, API usage, and additional channels.
- 6.** Describe any implementation, onboarding, or professional services fees, including a breakdown by activity.
- 7.** Describe your approach to telephony and network charges, including PSTN call charges, SIP trunk costs, and whether inclusive call bundles are available.
- 8.** Confirm your annual price review mechanism, including whether prices are fixed for the contract term or subject to annual increases, and the notice period for any changes.
- 9.** Describe any financial penalties or service credits available in the event of SLA failures, including the thresholds and process for claiming.
- 10.** Provide at least two customer references from organisations of a similar size or sector that we may contact as part of the evaluation process.

## Section 5: Evaluation Criteria

### Suggested Weighting Framework

The following weightings are a starting point. Organisations should adjust these to reflect their own priorities before issuing the RFP.

Category	Suggested Weighting
Core Platform Capabilities	15%
Omnichannel Capabilities	10%
AI and Automation	15%
Workforce Management and Quality	10%
Integration Requirements	10%
Security, Compliance, and Data Sovereignty	10%
Migration and Implementation	10%
Support, SLAs, and Service Management	5%
Commercial Model	15%
<b>Total</b>	<b>100%</b>

### Scoring Matrix

Each supplier response should be scored against the following scale for every requirement.

Score	Description
1	Does not meet the requirement. The capability is absent or fundamentally inadequate.
2	Partially meets the requirement. Significant gaps exist that would require workarounds or additional investment.
3	Meets the requirement. The capability is present and functional, delivered in a standard and acceptable manner.
4	Exceeds the requirement. The capability is strong, well designed, and offers clear advantages over a baseline expectation.
5	Significantly exceeds the requirement. The capability is market leading, innovative, and delivers exceptional value.

To calculate the final weighted score for each supplier, multiply the average score for each category by the category weighting percentage. The sum of all weighted category scores produces the overall supplier score.

We recommend supplementing the scored evaluation with supplier demonstrations, reference calls, and a total cost of ownership analysis over the proposed contract term to ensure a fully rounded assessment.

## Section 6: Supplier Response Format

To ensure consistency and enable effective comparison, all suppliers are asked to structure their response as follows.

- 1. Executive Summary (maximum two pages):** Provide a concise overview of your proposed solution, highlighting the key strengths of your offer and why your organisation is well placed to deliver this requirement.
- 2. Company Overview:** Provide a brief description of your organisation, including your history, ownership, financial stability, number of employees, and number of CCaaS customers.
- 3. Solution Response:** Respond to every question in Sections 3a through 3h in the order presented. Each response should be clearly numbered to match the corresponding question.
- 4. Architecture Diagram:** Provide a high-level architecture diagram of the proposed solution, showing the key platform components, integrations, and data flows.
- 5. Commercial Proposal:** Respond to every question in Section 4. Provide all pricing in a separate, clearly structured pricing schedule.
- 6. Implementation Plan:** Provide a high-level project plan for the implementation, including key milestones, durations, dependencies, and resource requirements.
- 7. Case Studies:** Provide two or three relevant case studies from organisations of a similar size, sector, or complexity.
- 8. References:** Provide the details of at least two reference customers who have agreed to be contacted.
- 9. Assumptions and Exclusions:** Clearly state any assumptions made in your response and any items that are excluded from your proposal.
- 10. Response Deadline:** All responses must be received by [*insert date and time*]. Late submissions will not be considered.
- 11. Clarification Questions:** Any clarification questions should be submitted in writing to [*insert email address*] by [*insert date*].

## Appendix: Glossary of Key Terms

**ACD (Automatic Contact Distribution):** The system responsible for routing incoming contacts to the most appropriate available agent based on predefined rules, skills, priority, or data driven criteria.

**AHT (Average Handling Time):** The average time taken to handle a customer interaction from start to finish, including talk time, hold time, and any after call work.

**API (Application Programming Interface):** A set of protocols and tools that allows different software systems to communicate and exchange data with one another. REST APIs are the most common type used in CCaaS platforms.

**CCaaS (Contact Centre as a Service):** A cloud based contact centre platform delivered as a subscription service, replacing the need for on premise hardware and software.

**Conversational AI:** Artificial intelligence technology that enables natural language interactions between customers and automated systems, including chatbots and virtual agents, across voice and digital channels.

**CSAT (Customer Satisfaction):** A metric that measures how satisfied customers are with a specific interaction, product, or service, typically captured through post interaction surveys.

**FCR (First Contact Resolution):** The percentage of customer interactions that are fully resolved during the first contact, without the customer needing to follow up or be transferred.

**IVR (Interactive Voice Response):** A telephony system that interacts with callers through voice prompts and keypad inputs, enabling self service transactions and routing callers to the appropriate destination.

**NPS (Net Promoter Score):** A metric that measures customer loyalty by asking customers how likely they are to recommend the organisation to others, producing a score from minus 100 to plus 100.

**Omnichannel:** An approach to customer engagement where all communication channels are integrated into a single platform, providing a seamless experience for both customers and agents.

**PCI DSS:** Payment Card Industry Data Security Standard. A set of security standards for organisations that accept, process, store, or transmit credit card information.

**SIP (Session Initiation Protocol):** A signalling protocol used to establish, maintain, and terminate voice and video communication sessions over IP networks.

**SLA (Service Level Agreement):** A formal commitment between a service provider and a customer that defines the expected levels of service, including availability, response times, and resolution targets.

**UCaaS (Unified Communications as a Service):** A cloud based platform that delivers enterprise communication tools such as voice calling, video conferencing, messaging, and presence as a subscription service.



**WFM (Workforce Management):** The set of processes and tools used to forecast customer demand, schedule staff, and manage adherence in real time.

**WFO (Workforce Optimisation):** A broader discipline encompassing workforce management, quality management, performance management, and analytics.

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*This template has been prepared by HiSynergy Consulting Ltd, an independent, supplier agnostic contact centre and customer experience consultancy. For support with your CCaaS procurement, including requirements definition, RFP management, supplier evaluation, and platform selection, visit [www.hisynergy.co.uk](http://www.hisynergy.co.uk) or email [hi@hisynergy.co.uk](mailto:hi@hisynergy.co.uk).*

## About HiSynergy Consulting

HiSynergy is an independent contact centre and customer experience consultancy. We work with organisations across the private and public sector to evaluate, select, and deliver contact centre technology, including CCaaS, UCaaS, and workforce optimisation platforms.

Our independence is fundamental to how we work. We have no commercial relationships with technology suppliers, which means our advice is driven entirely by what is right for the client.

Our services:

**Evaluate:** Independent assessment of your current contact centre technology, operations, and supplier landscape

**Define:** Requirements definition, RFP management, and supplier selection

**Govern:** Programme management and governance for contact centre implementations

**Finance:** Business case development, financial modelling, and TCO analysis

**Service:** Post-implementation review and ongoing optimisation

Founded by Stuart Fadden, HiSynergy brings over 20 years of hands-on experience in contact centre strategy, procurement, and delivery.

Get in touch

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