



# RFP Checklist



**SWARTZ**  
CONSULTING LLC  
EXPERIENCE, EXPERTISE & INTEGRITY IN TECHNOLOGY CONSULTING

# Who is Swartz Consulting?

*We are experts who are not trying to sell you any products. As independent, vendor agnostic consultants, we help our clients find the best voice communications technology to fit their unique situation.*

*We are veterans of hundreds of projects, and have the experience required to guide you through your phone system replacement project.*

*Swartz Consulting, LLC was founded in 1991 by Melissa Swartz. Melissa brings value to her clients by minimizing risk and optimizing costs. She knows the industry—what's out there, what works and what doesn't. And she has the unique ability to understand both business and technology, and how to use technology effectively to solve business problems (and to recognize when technology isn't the answer).*

*Melissa Swartz a past president of the Society of Communications Technology Consultants. She is a regular contributor to [No Jitter](#) and [BCStrategies](#), and a presenter at Enterprise Connect.*



Regular Contributor  
to No Jitter



Expert Speaker at  
Enterprise Connect



Member of the elite  
BC Strategies experts

# UCaaS RFP Checklist

## General Information

- Overview of your organization
- Overview of project—what are you hoping to accomplish?
- Current environment
  - High level list of existing solution components
  - Pain points to be eliminated
- New solution expectations
  - How will it be different from the current environment?
    - Will all components of the existing environment also be required in the new solution?
- Project schedule
  - Date RFP is issued
  - Bidder's conference date (optional)
  - Last day for questions
  - Proposal due date
  - Vendor presentations date
  - Target date for final selection
  - Contract negotiation period
  - Begin implementation
  - Go live

# Proposal Information

- Proposal format
- Explain how you want them to submit the proposal. Is there a specific table of contents that you want them to follow? (Hint: a standard format makes it easier to compare proposals)
  - Do you want proposals in a specific format (such as Word) or is PDF acceptable? (Note that with PDF it is difficult to cut and paste. This may make your comparison process more difficult).
  - Do you want to be able to compare pricing from multiple proposals? (You may want to specify that pricing be submitted in Excel format instead of PDF to make cutting pasting into a comparison document easier).
  - How long must the pricing be valid?
- Proposal Delivery
  - Date, time, and location proposals are due
  - Format of proposals (electronic, print, number of copies)
  - Address for submittal (physical address, email, etc.)
- Selection Criteria





## Legal Stuff

- Terms and Conditions
- Your organization's standard language
- Payment Schedule
  - Be sure to withhold at least 25% of the upfront charges until the system has been accepted
  - Do not make any payments for monthly services until your numbers have been ported to the new solution and you are up and working

**General info**

- Name of company
- Company representative and contact information
- References
- Qualifications
- Size
- Longevity in marketplace
- Longevity and experience with proposed solution

**Questions for a cloud or hosted solution** (not needed for a premise solution):

- Longevity in cloud market
- Quantity and quality of data centers
  - How many data centers?
  - Are they geographically separated?
  - What tier (1-4) are the facilities?
  - How are they connected?
  - How does failover occur?
- Connectivity
- What options do they offer for connecting to their data centers? OTT (Over the Top via an internet connection)? Private connection such as MPLS or SD-WAN? Both?
- How many connections are required?
- Do they provide the connectivity?
- Do they offer a “Bring your own bandwidth” option? Do you want that?
- What about backup/failover/resiliency options—how are these supported?
- What happens to DID calls if their data center fails? Can they re-route?
- Can they port your numbers?

- Specific Requirements
- Specific features or capabilities that must be provided
- Questions about Service and support capabilities
- Other

## Requirements for New Solution

- List important capabilities
- List the components required in the new system, including any new capabilities. These may include: Phone instruments, Overhead paging, Call accounting, IM/Chat, Audio conferencing, Document sharing, Video conferencing, etc.
- Provide counts for
  - Phones required, by model (these can be described generically as small, medium, large, or by function such as “conference room” and “general user”)
  - Other devices to be supported by the new solution (public area phones, faxes, other analog devices, alarms, elevator phones, entryway and parking lot phones, etc.)
    - Soft phones if desired
    - Attendant consoles (main answering position)
  - Provide counts and describe capabilities required for licenses—how many and what type?
    - Basic license for public areas
    - General user license capabilities, and the number of devices that are included
    - Power user license capabilities, and the number of devices that are included
    - Mobile user license capabilities, and the number of devices that are included
  - Number of connections to the outside world (number of simultaneous calls to be supported)



## Requirements for New Solution

- List required and optional features
  - Features and software
  - 911
  - Resilience and disaster recovery
  - Voice Mail
  - Voice Mail administration
  - Automated Attendant
  - Call Accounting
  - Paging
  - Administration capabilities
- List all required integrations, existing or new
- List all security and compliance requirements (PCI, HIPAA, requirements to keep recordings for a specified period, etc.)
- Provide requirements for advanced capabilities such as:
  - Unified Messaging
  - Mobility
  - Conferencing
  - Collaboration





# Implementation Requirements

- Structure of the implementation team?
  - Sample project plan
  - What tools will they use (collaboration tools, document storage, etc.)?
  - User configuration process; how much will be customer's responsibility?
    - Number porting guidance and process
    - Change control
    - Network assessment and configuration
    - Training
    - Phone placement
    - Day 1 support
    - Transition to ongoing support team
- Require an overview of the implementation process and a sample project plan
  - Structure of the implementation team?
  - What tools will they use (collaboration tools, document storage, etc.)?
- What parts of the process are the customer's responsibility?
- What is the change control process?
- Define your training requirements (for users and for the admin team)
  - Training format (on-site, train-the-trainer, web-based, etc.)
  - How many people will be trained?
  - What training documentation is required?
- Day 1 support requirements
- Acceptance criteria
- Transition to ongoing support team

# Ongoing Support

- Definition of major and minor outages
- Response times expected for each tier of outage or issue
- Penalties for non-performance
- Customer responsibilities vs vendor responsibilities
- Who is responsible for problems with connectivity (incoming and outgoing calls)
- Customer portal or tools for submitting change requests and troubles
- Customer tools for administration of solution
- What levels of support are provided when third party solutions are integrated and there are performance problems?
- Are there any components of the solution that they do not support?
- How much depth of expertise does the bidder have for supporting all facets of the solution?

## What's Next?

**Swartz Consulting** offers a full range of services to support you in the process of replacing your existing phone system.

We offer multiple options:

### Do It Yourself

- Document Templates
- Worksheets
- Process Roadmap

### DIY with Coaching

- Everything in DIY
- Calls with our team
- Review of your document

### Done For You

- We assess the requirements, create the documents, and manage the process for you

Have questions? Contact us: Phone: 913-894-0159

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