

[Your Logo Here]

[Your Company Name]

Integrated Customer Care and Billing System

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Request for Proposal (RFP)

**SUMMARY OF VENDORS' RESPONSES
AND RECOMMENDATION**

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Process Description

The original Request for Proposal for a Customer Care and Billing System was sent to five vendors based on discussions with and the desires of the [Your Company Name] management team and based on my past experiences with various vendors relating to billing system due diligence. There were three vendors who responded to the requests sent out. These responding vendors were:

1. Vendor 1 – System Name
2. Vendor 2 – System Name
3. Vendor 3 - System Name

The following vendors were contacted but either failed to respond or chose not to participate in the process:

1. Vendor 4 – System Name
2. Vendor 5 – System Name

In the following pages, I have provided the original description of the proposed Solution Requirements, the Minimum Requirements description, three types of information comprising the responses provided by the three vendors responding to the RFP, and my recommendations based on these responses.

In the vendor comparisons, I have *first* shown each vendor's "less than affirmative" responses to a specific list of desired functions for a customer care/billing system. Each "less than affirmative" response falls into one of the five following categories:

1. Cannot perform function
2. Limited abilities
3. Requires add-on module or Application Program Interface (API) to an out-board or third-party system
4. Planned future enhancement
5. Response unclear, incomplete, or not enough information for vendor to answer

A summary of each vendor's negative responses is provided at the end of the Detailed List of Desired Functionality section.

The *second* section of information compares the vendors' written responses to miscellaneous questions posed in the RFP. The *third* vendor comparison is of the pricing proposed by the various respondents to the RFP.

My recommendation is the last section of this document.

Minimum Requirements

(Part of original document – provided only for information purposes)

Your response to this RFP should briefly describe how your proposed solution meets the following minimum requirements:

The proposed solution must be able to work in a client-server environment and be available 24 hours per day, 7 days a week. It must provide for centralized control of the databases but with real-time distributed access.

The application must be able to support the following future needs in terms of:

- growth of the business (volumes and services)
- evolution of the business environment (technologies)

The proposed packages should be able to incorporate and minimize the time required to make them operational.

Real-time online multi-user accesses (with appropriate security to preserve data integrity) together with a batch processing capability.

Maintainability and stability of any recommended core technologies are important and will be a key consideration.

The proposed application/system must be fault-tolerant (i.e. it must be designed to ensure maximum availability).

Detailed List of Desired Functionality

The numbers in the columns under each vendor's name correspond to the response categories shown under "Notes" at the bottom of each page. The total number of responses in each category are given at the end of this section

Description of function/feature	VENDOR 6	Vendor 7	Vendor 3	Vendor 2	VENDOR 1
1 - Customer care management (1) :					
• Ability to tailor billing strategies to a wide variety of customer structures (single service or multiple service customers)					
• Multiple customer types (individual, corporate, bulk, hotel)					
• Customer information distinct from account (address) information					
• Flexible customer set-up options				2	
• The relationship between a service and the customer can be a billing relationship and/or a service relationship (e.g. a service used by one customer may be billed to another)					
• All information associated with the account					
- products/services associated with the account					
- products/services orders					
- trouble tickets					
- billing information such as rate packages or promotional rates					1
- payments					
- adjustments and refunds					
- current accounts					
- collection information					
- tracking by operator of adjustments or refunds					
- notes attached to a customer					
- billed and un-billed services details					
- current and historical equipment and rate details					
- current and historical customer bills					
- credit history (past due, NSF, disconnect notices, disconnect non-pay, adjustments processed – this year and last year).					
- customer demographics					
- user-defined fields					
NOTES:	3. = Requires add-on module or Application Program Interface (API) to an out-board or third-party system				
1. = Cannot perform function	4. = Planned future enhancement				
2. = Limited abilities	5. = Response unclear, incomplete, or not enough information for vendor to answer				

Description of function/feature	VENDOR 6	Vendor 7	Vendor 3	Vendor 2	VENDOR 1
1 - Customer care management (2) :					
• Contact logging available for tracking customer inquiries and problems and documenting actions taken, along with date and time, and initiate follow-up dates for further action if necessary. System should automatically log user ID for all transactions.				2	
• Credit information recording and tracking				1	
• Ability to interface with credit information services		1		3	
• The ability to update customer and account details without the need to create a service order		1			
• A user can quickly locate a customer by any one of :					
- customer name					
- master account name				4	
- multiple addresses (ex : residential, location, billing)				3	
- customer number				2	
- account number, master account number					
- social security number					
- drivers license number				1	
- converted meterial number		1			
- phone number of either the service location				5	
- partial meterial numbers					
• The following customer on-line functions are available :					
- account name change					
- account transfer				4	
- converter box control (parental control channel lock-out)	3				
- change bill cycle to meet customer wishes					
- service transfer				4	
- equipment transfer	3			4	
• The following customer on-line data are available :					
- contact for billing, credit, and other account contact information				3	
- customer status					
- multiple phone numbers and addresses					
- summary of account history by service change by service code description					
- account memo details					
• The ability for the customer to request a bill by one or more of the following ways :					



Summary of Vendors' Negative Responses

Category for Negative Responses	VENDOR 6	Vendor 7	Vendor 3	Vendor 2	VENDOR 1
• Cannot perform function	55	105	39	84	22
• Limited abilities	22		1	36	3
• Requires add-on module or Application Program Interface (API) to an out-board or third-party system	56		1	31	2
• Planned future enhancement	4		1	13	4
• Response unclear, incomplete, or not enough information for vendor to answer	7		26	34	0
TOTAL	144	105	68	198	31

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Additional Questions and Vendor Responses

Additional services

Which plant status-monitoring packages does the proposed system support?

Vendor 3 Response :

██████ does not currently support a plant status-monitoring package, however, we recognize the business requirements of [Your Company Name]. ██████ would offer the option of an interface to a third party package which would offer plant status-monitoring.

Vendor 2 Response :

██████████ Outage Module provides a means by which potential telephony and cable plant outages can be automatically detected and reported. Detection is based on the receipt of a specified number of designated "no service" trouble calls over a specified period of time. System level parameters allow the user to customize the criteria to meet the needs of their plant. Mechanisms are included that allow the system to manage outage conditions manually. This includes applications to manually set an outage, clear an outage, display outages, display amplifier information, and reset call totals.

In addition, the ██████████ offers a ██████████ scheme which allows the end user the ability to schedule and assign plant maintenance work that is not related to a particular location.

A ██████████ is provided in conjunction with ██████████ part ██████████. The ██████████ provides the critical applications link to the ██████████ system's transaction management capabilities and the ██████████ system. ██████████ provides operators with the necessary services to manage the network, detect faults and to access user data for accurate accounting and customer billing. Other Management programs include Circuit Management Reports, and telephony Cabinet Diagnostics.

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VENDOR 1 Response :

Although ██████████ product offering, VENDOR 1 will be adding this functionality to the product in the near-term. This functionality is currently planned for the second quarter of 1999.

Does the proposed solution currently interface with Scientific Atlanta's analog head-end controller and digital network control system? If not, what interfaces are supported?

Vendor 3 Response :

██████ supports various interfaces for each client's specific billing requirements. ██████ welcomes the opportunity to discuss your interface requirements and timelines for future implementation.

Vendor 2 Response:

Financial Proposal

(See attached Excel spreadsheet)

An attachment is provided summarizing the pricing for the three vendors who responded to the Billing System Request for Proposal. In this attachment, I have tried to create an “apples-to-apples” comparison by using a common set of forecast subscriber numbers over a five year period and applying the various vendors’ pricing structures over that period.

There are substantial differences in how the various vendors price their products. Some have heavy license fees up front, one charges license fees as a part of the monthly maintenance charge per subscriber, and another charges for many miscellaneous transaction fees each month. Hopefully, the five-year total cost comparison compensates for these drastic differences in pricing methodology.



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