Solicitation Response(SR) Dept: 0323 ID: ESR03272400000005477 Ver.: 1 Function: New Phase: Final ▾ | Modified by batch , 04/02/2024

Header 📎 4

List View

| **General Information** | Contact | Default Values | Discount | Document Information | Clarification Request |

Procurement Folder: 1388009

Procurement Type: Central Master Agreement

Vendor ID: VS0000045530 ⬆

Legal Name: Insite Managed Solutions, LLC

Alias/DBA:

Total Bid: $465,990.00

Response Date: 04/02/2024 📅

Response Time: 11:29

Responded By User ID: insitemanaged ⬆

First Name: Nathan

Last Name: Williamson

Email: nwilliamson@callinsite.con

Phone: 2393791532

SO Doc Code: CRFQ

SO Dept: 0323

SO Doc ID: WWV2400000007

Published Date: 3/25/24

Close Date: 4/2/24

Close Time: 13:30

Status: Closed

Solicitation Description: Virtual Call Center

Total of Header Attachments: 4

Total of All Attachments: 4

Proc Folder:	1388009
Solicitation Description:	Virtual Call Center
Proc Type:	Central Master Agreement

Solicitation Closes	**Solicitation Response**	**Version**
2024-04-02 13:30	SR 0323 ESR03272400000005477	1

VENDOR
VS0000045530 Insite Managed Solutions, LLC

Solicitation Number:	CRFQ 0323 WWV2400000007				
Total Bid:	465990	**Response Date:**	2024-04-02	**Response Time:**	11:29:18
Comments:					

FOR INFORMATION CONTACT THE BUYER
Brandon L Barr
304-558-2652
brandon.l.barr@wv.gov

Vendor
Signature X   **FEIN#**   **DATE**

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	AWS Services				396780.00

Comm Code	Manufacturer	Specification	Model #
81112006			

Commodity Line Comments: See attached Exhibit A Pricing File

Extended Description:

AWS Services
These are estimates, actual costs will be based on consumption

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	Cloud Assured Managed Services				63720.00

Comm Code	Manufacturer	Specification	Model #
81112006			

Commodity Line Comments: See attached Exhibit A Pricing File

Extended Description:

Cloud Assured Managed Services
These are estimates, actual costs will be based on consumption

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Transfer and Setup Costs	1.00000	LS	5490.000000	5490.00

Comm Code	Manufacturer	Specification	Model #
81112006			

Commodity Line Comments: See attached Exhibit A Pricing File

Extended Description:

Transfer and Setup Cost
One-Time Fee

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	Professional Service Hours (PM)	0.00000	HOUR	9880.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112006			

Commodity Line Comments: See attached Exhibit A Pricing File

Extended Description:

Professional Service Hours (PM)
These are estimates, actual cost will be based on consumption

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	Professional Service Hours (Junior Developer)	0.00000	HOUR	28320.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112006			

Commodity Line Comments: See attached Exhibit A Pricing File

Extended Description:

Professional Service Hours (Junior Developer)
These are estimates, actual cost will be based on consumption

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Professional Service Hours (Senior Developer)	0.00000	HOUR	20700.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112006			

Commodity Line Comments: See attached Exhibit A Pricing File

Extended Description:

Professional Service Hours (Senior Developer)
These are estimates, actual cost will be based on consumption

Exhibit A - Pricing Page for WorkForce West Virginia
Virtual Call Center

Description	Specification	Estimated Monthly Cost	Estimated Annual Contract Amount	
Genesys Cloud Voice and Chat Per License Cost	4.1-4.4	$115.00	$1,380.00	
Genesys Cloud per 1,000,000 minutes inbound	4.1-4.4	$15,000.00	$180,000.00	
Genesys Cloud per 1,000,000 minutes outbound	4.1-4.4	$11,900.00	$142,800.00	
Genesys Services per 500,000 chat messages	4.1-4.4	$5,000.00	$60,000.00	
AWS Services Storage (can be retained with Genesys)	4.1-4.4	$1,050.00	$12,600.00	
TOTAL GENESYS CLOUD SERVICES ESTIMATED COSTS			$396,780.00	
Description	**Specification**	**Etimated Monthly Cost**	**Total**	
Cloud Assured Managed Services (monthly)	4.5	$5,310.00	$63,720.00	
Description	**Specification**	**One Time Fee**	**Total**	
Transfer or setup costs (one-time) - SMS Option	4.6	$5,490.00	$5,490.00	
Description	**Specification**	**Estimated Hours**	**Hourly Cost**	**Total**
Professional Service Hours (PM)	4.7	40	$247.00	$9,880.00
Professional Service Hours (Junior Developer)	4.7	160	$177.00	$28,320.00
Professional Service Hours (Senior Developer)	4.7	100	$207.00	$20,700.00

GRAND TOTAL $524,890.00

Note: The estimated quantity is for evaluation purposes only. Actual volume is undetermined. No future use of the contract or any individual item is guaranteed or implied.

VENDOR'S NAME:

VENDOR'S REPRESENTATIVE:

VENDOR'S PHONE & EMAIL:

VIRTUAL CALL CENTER

WorkForce West Virginia

Solicitation Number CRFQ-0323-WWV2400000007-4

CONTACT
NATHAN WILLIAMSON
DIRECT PHONE: 239-379-1532
EMAIL: NWILLIAMSON@CALLINSITE.COM

Workforce West Virginia
C/O: Brandon Barr
1900 Kanawha Blvd E
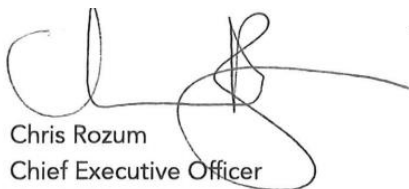BLDG 3, Suite 300
Charleston, WV 25311

April 2, 2024

Dear Brandon,

On behalf of the more than 200 call center professionals at Insite Managed Solutions, I respectfully submit our proposal to Workforce West Virginia's Virtual Call Center opportunity [CRFQ-0323-WWV2400000007-4]. With 17 years of extensive experience in the call center space, our firm has successfully launched more than 150 Call Center as a Service (CCaaS) solutions. Our unwavering commitment to excellence and innovation drives our confidence that, if selected, we will be the enablement partner to ensure Workforce West Virginia achieves a seamless transition into a scalable, optimized virtual call center footprint.

At Insite, we understand the critical role call centers play in facilitating vital connections between residents and essential services, particularly in the realm of employment needs. Our proven track record in implementing cutting-edge CCaaS solutions positions us as the ideal partner to support Workforce West Virginia in its mission to serve the workers of West Virginia more effectively.

Our approach to this project is rooted in a deep understanding of the unique challenges faced by both call center agents and customers alike. We recognize the importance of empowering agents with user-friendly tools and streamlined processes to enhance productivity and customer satisfaction. Moreover, we are committed to ensuring that residents receive prompt, personalized assistance through our state-of-the-art CCaaS platform, designed to optimize the caller experience and foster positive interactions.

Furthermore, we understand the complexities that come with transitioning both vendors and technology and have designed a solution that simplifies these situations and put together a team that has proven success in transitions. Thank you for considering Insite as the enablement partner for Workforce West Virginia's Virtual Call Center modernization. We look forward to the possibility of partnering with you and contributing to the success of the Workforce West Virginia call center team.

Sincerely,

Chris Rozum
Chief Executive Officer
(239) 284-7529

Table of Contents

Engagement Background

WorkForce West Virginia is the Mountain State's source for workforce resources; including job opportunities, unemployment compensation, training, tax incentives and labor market information. As a On Insubuy.com, anyone can get instant quotes for various plans, make side-by-side comparisons, and make instant purchases of most insurance plans.

As the ultimate center for workforce resources, WorkForce West Virginia's call center operations are one of a complex support system of brick-and-mortar, call, chat, and online resource support for jobseekers. As such, unlike many service-oriented industries where most customers encounter the usual, unknowledgeable representatives only trying to get their initial business, WorkForce West Virginia provides a public service which ultimately impacts people's livelihoods. All of these services come at no-cost to your customers.

What Winning Looks Like For You

Our mission is to help our clients "win" where it matters most. We begin every engagement by defining and aligning what winning looks like for the individual client. This step empowers our team to optimize our navigation, communication, and action toward exceeding your unique goals. By aligning at the earliest opportunity, we can properly adjust our approach and communication to ensure alignment continues through the entirety of our engagement.

For the team at WorkForce West Virginia, winning looks like:

1. A rapid, seamless transition of your CCaaS technology and vendor, protected against risks which can lead to unplanned delays and costs.

2. Improved business intelligence and decision making based on data collected from the new CCaaS which was custom selected to a) integrate into WorkForce West Virginia's existing tech stack and b) provide the optimized and manageable growth you anticipate over the upcoming years.

3. Enhance WorkForce West Virginia's customer experience through an enablement partnership with Insite, a small business that has established itself as the partner of choice within the call center process and technology sector.

Supplier Background & Information

Founded in 2007, Insite Managed Solutions, LLC is a customer experience enablement firm that supports technology-enabled solutions to government, nonprofit, and Fortune 500 organizations. Insite has built a reputation as the leading customer-centric organization with unparalleled experience and depth in contact centers around the world. Insite has the privilege to serve more than 660 organizations to improve their customer service through people, process, and technology transformations, boasting a 95% overall client retention after our first project. Insite's employees come from a diverse background of professional and socioeconomical experiences and make it our mission to enable our clients to win. As a leader in integrating Human Operations® and technology, entities ranging from 1 agent to more than 500 agents have trusted Insite as their implementing partner to help improve their virtual call centers. As such, we

have staff dedicated to the implementation of Call Center as a Service (CCaaS) technology and have performed more than 150 of these transitions since 2019.

Insite's qualifications:

➢ Our enablement firm specializes in holistic contact center operations improvements. We have helped more than 660 organizations improve their contact center operations, achieving a 95% client rebuy rate.

➢ We are best positioned to handle the vendor and technology transition with no additional setup costs because we have mapped and improved nearly 190,000 contact center processes in our firm's history. With such institutional knowledge and benchmark opportunities, we will be able to make the technology work for the people involved, not the other way around.

➢ Our technology experts have experience in implementing the solutions proposed, and through our people-first successes, we have delivered complex CCaaS solutions to similarly sized in agent and customer touches.

Legal Name:	Insite Managed Solutions, LLC	
Legal Structure:	A Limited Liability Company formed in 2007 in the State of Delaware	
Contact Information:	1336 SE 47th Street Cape Coral, FL 33904	
Website:	https://getinsite.io/	Nathan Williamson Phone: (239) 379-1532 Email: nwilliamson@callinsite.com

Insite has 17 years of experience in call centers, including more than 150 CCaaS transitions in the past 5 years alone. We are an authorized vendor partner of Genesys at the time of project execution.

Scope of Engagement (Approach)

To support WorkForce West Virginia's objectives, Insite will dedicate one senior resource who will serve as Project Manager ("PM"). Our PM will integrate with the WorkForce West Virginia team and strategize and collaborate to achieve each project milestone and objective within the outlined roadmap. Our PM will ensure the Insite team will deliver top quality for every engagement within the scope of these initiatives. As an extra layer of quality assurance, our PM will be supported by a Client Success Lead who will be the independent eyes and ears and escalation point of contact for the WorkForce West Virginia team. Nevertheless, throughout this engagement, the PM will provide weekly status updates with your key stakeholders to communicate results, barriers, and solutions effectively.

For each phase of the transition and implementation, Insite will manage progress through workstreams. This allows us to use a customized hybrid approach informed by Agile but proven by dozens of complex vendor and technology transitions in the call center industry. Insite's PM will meet with WorkForce West Virginia's leadership team to review scope, coordinate most appropriate resources with the needed expertise, and end-to-end project management for each objective planning and execution. This PM will also provide guidance and feedback as to pros/cons, along with considerations, in the decision-making processes. Bottom line: your Insite PM is your enablement champion who ultimately is there to help you win. If our PM has recommendations to make which will have positive outcomes for

your call center operations and ultimately the workers of West Virginia, they are empowered to communicate those with you.

Insite has crafted an approach that will set WorkForce West Virginia up for successful planning, deployment, and change management for all contact center technology, including telephony and customer journey (CCaaS), considering integration with customer record management (CRM), data visualization (dashboards), knowledge management (KMS), learning management (LMS), speech and predictive analytics (SA), workforce management (WFM), and AI/RPA. For this engagement, Insite will (1) ensure alignment on the business requirements related to the technology's role in the Virtual Call Center's operations, (2) affirm the most appropriate CCaaS approach required, (3) develop the project implementation plan and support project management efforts as needed to achieve the targeted go-live dates, (4) ensure a transition plan with the incumbent vendor and establish contact to begin successful transition, (5) complete transition and setup activities, and (6) conduct acceptance testing and smooth operations of the ecosystem post transition/setup.

Step 1 / Week 0: Engagement Kickoff - Insite will host a kickoff call with all stakeholders to review all of the components of the project charter including scope, resources, requirements, deliverables, timeline and milestones, communication cadence and approval processes. Insite will meet with WorkForce West Virginia's key stakeholders to discuss scheduling interviews with their team and vendor demonstrations.

Step 2 / Week 1: Business Requirements and Vendor Transition Planning – Insite will meet with the incumbent vendor to begin formulating a transition plan and gain appropriate access to enable a smooth and seamless vendor to vendor transition. Simultaneously, we will meet with all relevant stakeholders identified in Step 1, determine, define, and document all business requirements needed for the virtual contact center 's management and efficiencies. We will complete the comprehensive Business Requirements Document (BRD) that will clearly define WorkForce West Virginia's specific requirements and needs, aligned and validated to the RFQ documentation, but tactically as well to identify key business objectives, service expectations, and other nuances that will determine the implementation design and plan of the CCaaS solution.

Step 3 / Week 2: CCaaS Implementation Plan – Based on our authorized partner relationship with Genesys and our proposed approach of Genesys Cloud 2 for your CCaaS and the results of the BRD, Insite will develop detailed implementation planning that will outline all of the steps necessary for a successful planning, deployment, and post-launch change management of CCaaS solution; plan will be used to map timeline, validate level of effort, and confirm resources required to be successful. This is a highly detailed and technical implementation plan. In response to the Q&A WorkForce West Virginia noted that some operational details are not necessary to provide quote on the opportunity. While we agree with this position, our experience has shown us that the majority of call center technology implementations which experience delays are delayed by the unknown or the unimportant. Our implementation plan takes a risk-based approach to consider all contingencies, so your leadership is informed and operations are not impacted.

Step 4 / Week 3: Vendor Transition and Systems Integration - Insite will diligently focus on setting up the Genesys environment. We'll begin by provisioning all essential infrastructure and resources required within the Genesys environment. This includes configuring virtual call center setups, establishing routing strategies, and defining agent profiles to ensure seamless operation. Additionally, we will carefully integrate Genesys with existing telephony systems, CRM platforms, and any other necessary third-party applications to maintain continuity in operations. As we move into the latter half of Week 3, our attention will shift towards preparing for data migration. We'll once again thoroughly assess data migration requirements, meticulously reviewing customer records, call logs, and historical reports, ensuring that all transitions will be done in accordance with internal policy, DOL grant terms, and state document retention laws. Because we would have already started a framework for a robust data migration strategy,

we will validate all the necessary tools or scripts needed to efficiently transfer data from AWS to the Genesys platform. This strategic approach will ensure a smooth transition while preserving crucial data integrity throughout the process.

Step 5 / Week 4: Complete Configuration and User Training and Documentation – Insite believes that all technology is successful when Human Operations® are optimized. As we complete configuration, we will prioritize user training and documentation to ensure a smooth transition to the Genesys platform. Genesys is one of the more user-friendly platforms and drawing on the agent's current understanding of the AWS environment amplified by our deep understanding of Genesys features and best practices, we will develop comprehensive training materials and documentation for call center agents, supervisors, and administrators. These materials will cover a wide range of topics, including platform navigation, call handling procedures, workflow management, and system administration. Leveraging our experience, we will tailor training materials to address the specific needs and skill levels of each user group, ensuring effective knowledge transfer and adoption of the Genesys platform. Additionally, we will conduct interactive training for users to familiarize users with the Genesys platform, its features, and best practices. These sessions will provide hands-on experience and opportunities for users to ask questions and clarify doubts. By leveraging our expertise, we will ensure that users are equipped with the knowledge and skills needed to leverage the full capabilities of the Genesys platform, driving operational excellence, and delivering exceptional customer experiences.

Step 6 / Week 5: Pilot Testing - Our focus will be on conducting thorough pilot testing of the Genesys environment to ensure its readiness for full deployment. Leveraging our deep understanding of both Genesys and our business requirements, we will carefully select a group of users to participate in the pilot testing phase. During this phase, we will work closely with the selected users to validate the functionality, performance, and user experience of the Genesys platform. This will involve simulating real-world scenarios and workflows to assess how the system performs under various conditions. We will pay close attention to key metrics such as call handling times, system responsiveness, and user satisfaction. Additionally, we will actively gather feedback from pilot users to identify any issues or concerns that may arise during testing. We will maintain open lines of communication with users, encouraging them to provide candid feedback on their experience with the Genesys platform. Any issues or concerns raised during pilot testing will be promptly addressed and resolved to ensure a smooth transition to full deployment.

Step 7 / Week 6: Final Migration - We will execute the final data migration process from AWS to Genesys, marking a critical milestone in the transition process. Leveraging our expertise in data migration and our deep understanding of both platforms, we will ensure the accuracy and completeness of the transferred data. We will meticulously execute the data migration process, following established procedures and protocols to minimize the risk of data loss or corruption. Throughout the migration process, we will perform validation checks to confirm the successful transfer of data from AWS to Genesys. This will involve comparing data records between the two platforms to verify consistency and accuracy. Once the data migration process is complete, we will conduct comprehensive validation checks to confirm that all data has been successfully transferred and is accessible within the Genesys environment. Any discrepancies or issues identified during validation will be addressed promptly to ensure data integrity and continuity of operations.

Step 8 / Weeks 7-8: Observation and Engagement Closure – Our team will conduct comprehensive monitoring and advisement of operations in the new environment, ensuring smooth operations and complete successful transition to the Genesys platform has taken place. During this time, we will be in close coordination with key stakeholders to identify any transition pain points that need to be resolved. Moreover, our team will meet with project sponsors and key stakeholders to review our approach, analysis, and outcome to obtain feedback, and have discussion in

reviewing the results and deliverables. Upon successful closure of the observation period, we will transition WorkForce West Virginia to a steady state, allowing our evolution in the partnership to enter the managed services phase.

Managed Services - Following the successful implementation of the CCaaS solution, our team will transition into providing comprehensive managed services to ensure the ongoing success and optimization of the contact center operations. Leveraging our deep understanding of the CCaaS platform and our commitment to delivering exceptional service, we will focus on the following key areas:

1. Continuous Monitoring and Optimization: We will proactively monitor the performance and health of the CCaaS platform, including system uptime, call quality, and agent productivity. By leveraging advanced monitoring tools and analytics, we will identify areas for optimization and fine-tuning to maximize efficiency and effectiveness.

2. Incident Management and Resolution: Our team will be responsible for managing and resolving any incidents or disruptions that may occur within the contact center environment. This includes addressing technical issues, system errors, and performance degradation in a timely and efficient manner to minimize impact on operations.

3. Security and Compliance: We will implement robust security measures to safeguard sensitive data and ensure compliance with industry regulations and standards. This includes implementing access controls, encryption, and monitoring systems to protect against cybersecurity threats and unauthorized access.

4. System Updates and Maintenance: Our team will manage all system updates, patches, and maintenance activities to ensure the CCaaS platform remains up-to-date and secure. We will schedule updates during off-peak hours to minimize disruption to operations and perform thorough testing before deployment.

5. Training and Support: We will provide ongoing training and support to contact center agents, supervisors, and administrators to maximize their productivity and proficiency with the CCaaS platform. This includes offering refresher training sessions, providing user documentation and guides, and addressing any questions or concerns.

6. Performance Reporting and Analysis: We will generate regular performance reports and analytics to provide insights into contact center operations and identify opportunities for improvement. By analyzing key metrics such as call volume, average handle time, and customer satisfaction scores, we will help optimize workflows and enhance customer experiences.

7. Continuous Improvement: Our team will foster a culture of continuous improvement within the contact center environment, regularly reviewing processes, procedures, and technology to identify areas for enhancement. We will collaborate with stakeholders to implement best practices and innovative solutions to drive operational excellence.

Through our comprehensive managed services, we will serve as a trusted partner to the contact center, ensuring its ongoing success, resilience, and adaptability in an ever-evolving business landscape. By leveraging our expertise and commitment to excellence, we will help unlock the full potential of the CCaaS platform and deliver exceptional customer experiences to WorkForce West Virginia.
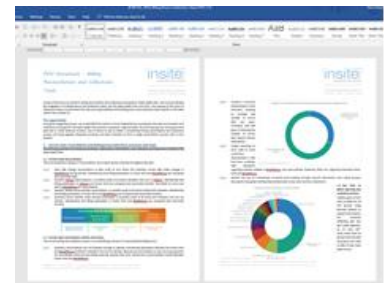
ENGAGEMENT DELIVERABLES

1. CCaaS Business Requirements Document (BRD)
This document outlines the business solutions for project requirements that are necessary for the project to deliver value and become the foundation of the project's life cycle. Insite will assess current state and future state needs, documenting the business and functional requirements, and this document will act as the blueprint to determine the right solution to meet Journey's needs.

2. Future State The State Organization Roles and Responsibilities POV
Insite will provide an analysis in the form of a Point of View (POV) Document of the current contact center structure, followed by a strategic outline of future state roles and responsibilities.

3. Best Practices Workshops and POV
Insite will provide Workshops and / or POV Documentation as comprehensive guides on best practices, protocols, standards, and procedures for the following seamless integration with the new CCaaS platform:
- Routing Strategy
- Workgroups
- Queues and Skills

4. Document Existing and Future Integrations
Insite will provide a detailed inventory of the State's current integration landscape. This document will outline the interfaces, dependencies, and workflows of existing systems, while proposing a roadmap for seamless integration with the new CCaaS provider.
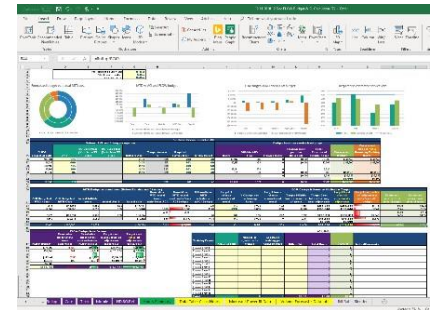
5. Document Existing and Future Telephony Architecture

Insite will provide documentation that will outline configurations, call flows, and telephony features, providing a comprehensive overview. We will propose an optimized telephony architecture aligned with the capabilities of the CCaaS platform, ensuring seamless integration and future scalability for the State's needs.

6. Quality Form Assessment

Insite will outline customized quality assessment forms that are aligned with organizational objectives, ensuring that the CCaaS platform is leveraged to measure and uphold service excellence. We will provide the State with a tailored toolset to maintain and improve service quality throughout the CCaaS implementation.

Training

While training is inherently embedded in the implementation plan and deliverables, Insite is committed to ensuring that training is not only done through academic settings, but in real world scenarios. As such, aligned with the implementation of the project, Insite has scoped in training days that can be used throughout the lifecycle of the project in order to provide customized, data-driven training that is scoped and coordinated with the UI Call Center leadership team.

Communication Cadence

Insite will provide weekly communications to review updates, uncovered risks and challenges, upcoming efforts, and milestones. Clear and transparent communication of status, progress, and next steps will keep the State and Insite in alignment throughout the engagement.

MEETINGS	PURPOSE	FREQUENCY
Kickoff Meeting	Serves as an opportunity for all stakeholders to align on engagement timeline and objectives. Additionally, this time will be used for the Insite	Once at the beginning

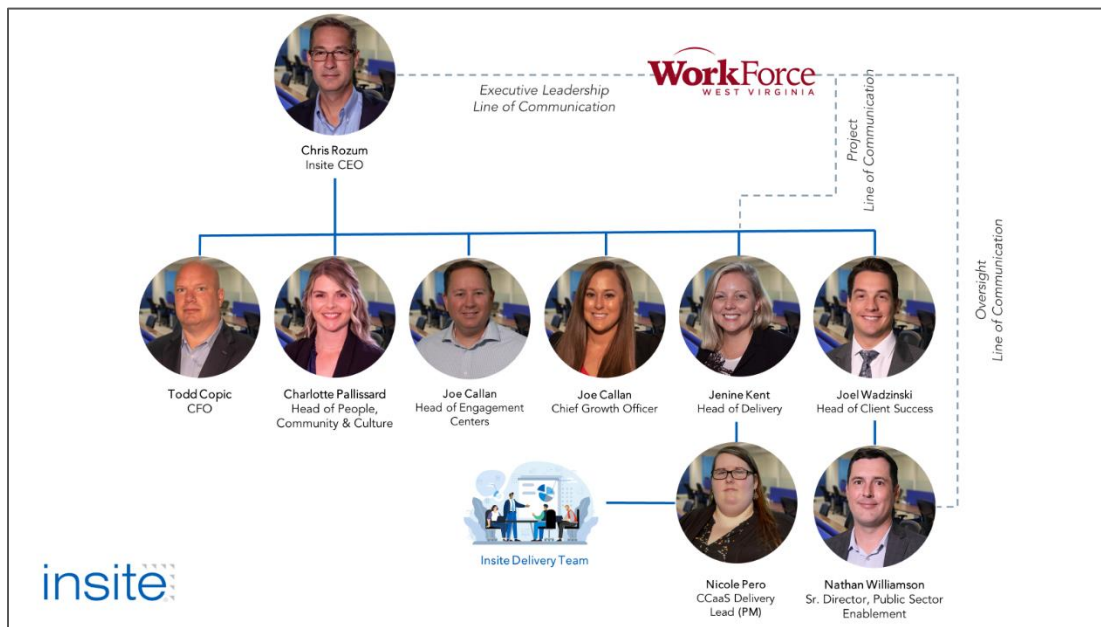|		
	team to collect additional information needed from the State prior to the start of the work.	
Weekly Status Review	Meet with Project Team to share and discuss (1) status update on work activities completed in current week, (2) what Insite will be expected to complete in the next week, (3) any challenges, obstacles, or risks, and (4) any insights or recommendations for improving efficiency or experience. Once the meeting is completed, Insite's PM will save the weekly status update in the shared folder along with the recording for anyone needing future reference.	Weekly on day of the week determined during the kickoff meeting
Quarterly Business Review	Meet with executive sponsors to share and discuss the overall direction of the engagement and strategically align on actionable requirements and next steps to ensure that all risks are mitigated and opportunities to improve the UI Call Center CCaaS modernization are road mapped.	Once a quarter
End of Phase Review	Review the overall engagement from end to end with accomplishments and lessons learned.	Once at the end of Implementation and then annually

Risk Management

In the simplest forms, we see two overarching risks that will impede the State's efforts to transform the WorkForce West Virginia Call Center's CCaaS: 1) choosing a CCaaS that doesn't meet current needs and is unable to scale to future needs over the next 7 years, and 2) an implementation strategy that does not embed with the Call Center operational team. In order to mitigate these risks, Insite's approach incorporates the following:

1) A Phase 1 CCaaS Selection Process with Business Reference Documents. Many vendors can propose a CCaaS up front, and we are as well with Genesys; however, we would be remiss as an enablement firm to not due our due diligence with the Call Center team and make sure all facts, including those that are too nuanced to be addressed by the RFQ, are incorporated into the implementation process.

2) We have clearly delineated the level of effort for the CCaaS implementation and sustainment and growth consulting efforts in our approach to make clear that Insite will continue to partner with the Call Center team to help them achieve success for the duration of this engagement in a unified, consistent, and

continuous environment. We have found that fragmented approaches where implementation efforts are bundled with consulting hours can lead to scope creep and delays in the implementation process. Moreover, we have scoped to ensure that our CCaaS experts are available to provide both strategically planned and issue- or request-based consultative services over the lifecycle of this engagement.

3) Consistent communication and escalation channels are designed and exclusive to the Call Center team. Moreover, as part of our organizational structure, our firm's Founder & CEO will play an integral part of the oversight team, led by our Client Success team. We have found that our unique organizational structure allows early identification and intervention of any risks, seen or unforeseen.

Key Personnel

3.3.1 Project Manager – Nicole Pero, CCaaS Delivery Lead at Insite

Nicole is a results-driven and seasoned Project Manager with over 10 years of experience spearheading successful technology transformations in call centers. Her proven track record of delivering complex projects on time and within budget is rooted in her complex understanding of how technology enables every role in a customer service enterprise. Nicole's career growth from an agent to a leading female in technology implementation is fortified by her ability to lead cross-functional teams and implementing innovative solutions to enhance operational efficiency and customer satisfaction even when timelines are aggressive. With more than 6 years of experience leading technology transformations at Insite, Nicole has been able to leverage her previous experience as a call center agent, workforce management analyst, and CCaaS implementer to help her clients succeed.

Nicole has led enterprise CRM and CCaaS implementations for some of the most complex and large-scale customer experience entities. For example:

> ➤ Nicole oversaw the end-to-end implementation of Genesys as a CCaaS for a 40,000 agent call center, optimizing resource availability and information flow for agents and managers. This initiative led to a 20% reduction in average handle time across all call types and a 35% increase in agent productivity. Moreover, because the information architecture was designed consistently, managers were able to start employing real time adherence strategies, improving staffing efficiency by stay on timeline because Insite could concurrently develop additional training for the agents.

> ➤ Nicole served as the CCaaS implementation project manager for the world's largest reinsurance company, overseeing a process-based redevelopment of their CCaaS and associated tech stack through a detailed understanding of how information flows through the workflow. Because of Nicole's ability to bring agile-based project management to this company, which had 15 different managers with fragmented information architecture, she was able to support the successful implementation 4 months ahead of the project schedule.

Why Genesys Cloud

Today's CCaaS Ecosystem:

In order to meet the headcount, volume, and technical requirements that the State of Arkansas anticipates for its UI Call Center, most CCaaS technologies at the surface will be able to provide the minimum technical requirements. However, based on our industry experience implementing CCaaS, we have found that the nuances of a call center operation, its customer, and its future strategy are unique and deserve unique approaches. While larger CCaaS solutions such as the UI's current technology – Genesys – may be the recommended approach, there are modernizations, advantages, and future opportunities that may better fit the UI Call Center. As such, we plan to begin our engagement with a CCaaS selection. There are many CCaaS technologies out there. For the sake of this proposal, we are providing initial market research that will inform the strategy of Phase 1 of our approach: CCaaS selection. Because the options and pricing models greatly vary, our pricing sheet for licensing per license per month assumes the maximum rate possible during our selection approach. Depending on the outcome of selection, this pricing could be lower, but it will not be higher.

Why Now is the Right Time for WorkForce West Virginia to Transition to Genesys

In selecting Genesys Cloud as our Contact Center as a Service (CCaaS) provider over AWS, our decision was driven by a meticulous evaluation process that considered our call center's specific requirements, technical advantages, user-friendliness, and long-term cost considerations. Genesys Cloud emerged as the optimal choice due to its comprehensive feature set, scalability, ease of use, and cost-effectiveness. As a DOL grant recipient, WorkForce West Virginia can rest assured that Genesys Cloud has the added benefit of being FEDRAMP certified ensuring the highest standards of information security.

One of the primary factors influencing our decision was Genesys Cloud's robust feature set, which aligned closely with WorkForce West Virginia's virtual call center's requirements. Genesys Cloud offers a wide range of advanced capabilities, including omnichannel communication, intelligent routing, workforce optimization, and AI-powered analytics. These features enable us to deliver exceptional customer experiences, streamline operations, and drive business growth. Moreover, as Genesys Cloud operates on AWS as a cloud service, we believed that this would be

the most seamless transition to a user-friendly call center CCaaS environment that will be sustainable for the call center's expected future growth.

GENESYS

Genesys Cloud CX Summarized Plan Comparison	CX1	CX 2 Digital	CX 2	CX 3 Digital	CX 3	EX
Self-Service						
Speech-enabled IVR	●		●		●	
Voicebots*	●		●		●	
Chatbots*		●	●	●	●	
Digital						
Unlimited chat and email routing		●	●	●	●	
Co-browse		●	●	●	●	
SMS		●	●	●	●	
Messaging apps		●	●	●	●	
Web messaging		●	●	●	●	
Inbound						
Inbound Voice Routing	●		●		●	
Voicemail	●		●		●	
Callback (IVR and web)	●		●		●	
Outbound						
Voice outbound campaigns	●		●		●	
Digital outbound campaigns		●	●	●	●	
Inbound / outbound blending	●	●	●	●	●	
Workforce						
Unified communications	●	●	●	●	●	●
Interaction recording	●	●	●	●	●	●
Screen recording	●	●	●	●	●	
Quality management and compliance		●	●	●	●	●
Workforce management				●	●	●
Employee performance and engagement				●	●	●
Speech and text analytics				●	●	
Integrations						
Access to AppFoundry Marketplace	●	●	●	●	●	●
Platform APIs	●	●	●	●	●	●
Insights						
Real-time and historical views	●	●	●	●	●	●
Historical reporting	●	●	●	●	●	●
Performance dashboards	●	●	●	●	●	●

Furthermore, Genesys Cloud's technical advantages played a significant role in our decision-making process. Unlike AWS, which primarily offers infrastructure-level services, Genesys Cloud provides a fully managed CCaaS solution that encompasses all aspects of contact center operations. This includes telephony integration, CRM connectivity, real-time reporting, and automatic scaling, among others. By leveraging Genesys Cloud's integrated platform, we can simplify our IT infrastructure, reduce complexity, and accelerate time-to-value.

In terms of user-friendliness, Genesys Cloud excelled with its intuitive interface and ease of customization. The platform's drag-and-drop design tools, pre-built templates, and flexible configuration options empower our team to quickly adapt to changing business needs without requiring extensive technical expertise. Additionally, Genesys Cloud offers comprehensive training resources and a supportive community to ensure our staff can maximize the platform's capabilities effectively.

Cost considerations also played a pivotal role in our decision to choose Genesys Cloud over AWS. While AWS may offer competitive pricing for infrastructure services, the total cost of ownership (TCO) for building and maintaining a contact center solution on AWS can be significant when factoring in development, integration, maintenance, and support costs. In contrast, Genesys Cloud's subscription-based pricing model provides predictable costs with no upfront investment required. Moreover, Genesys Cloud's pay-as-you-go pricing structure enables us to scale our usage up or down based on demand, optimizing cost efficiency without sacrificing performance.

Looking to the future, Insite's partnership with Genesys Cloud positions WorkForce West Virginia for long-term success and growth. With its commitment to innovation, continuous platform enhancements, and strong industry leadership, Genesys Cloud offers a scalable and future-proof solution that can evolve with our business needs. By leveraging Genesys Cloud's advanced capabilities, technical expertise, and cost-effective pricing model, we are confident in our ability to deliver exceptional customer experiences and drive business success in the digital age.

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Nathan Williamson, Sr. Director Public Sector Enablement
_____

(Address) 1336 SE 47th St, Cape Coral, FL 33904
_____

(Phone Number) / (Fax Number) 239.379.1532
_____

(email address) nwilliamson@callinsite.com
_____

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through *wv*OASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

Insite Managed Solutions, LLC
_____
(Company)
_____
(Signature of Authorized Representative)
Nathan Williamson, Sr. Director Public Sector Enablement 4/2/24
_____
(Printed Name and Title of Authorized Representative) (Date)
239.379.1532
_____
(Phone Number) (Fax Number)
nwilliamson@callinsite.com
_____
(Email Address)

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ WWV24*07

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:
(Check the box next to each addendum received)

[X] Addendum No. 1	[ ] Addendum No. 6
[X] Addendum No. 2	[ ] Addendum No. 7
[X] Addendum No. 3	[ ] Addendum No. 8
[ ] Addendum No. 4	[ ] Addendum No. 9
[ ] Addendum No. 5	[ ] Addendum No. 10

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Insite Managed Solutions, LLC
_____
Company

_____
Authorized Signature

4/2/24
_____
Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.