



Contact Center as a Service Cloud Based Solution



**Contact Center as a Service
Indiana University
Millennial Services LLC
Michigan City, IN**



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Objective: Millennial Services LLC, a Certified Zendesk Enterprise Support Administrator, will utilize Zendesk to build Indiana University their CCaaS.

Scope of Work

Must Include:

- **Cloud-Hosted Data Center (CCaaS):** Zendesk is a true Contact Center as a Service (CCaaS) solution, fully cloud-hosted, eliminating the need for on-premises software.
- **Secure Encryption:** Zendesk ensures secure encryption for all methods of communication, stored recordings, data in transmission, and at rest, adhering to industry-standard security protocols.
- **No Local Software Installation:** Zendesk operates entirely as web-based tools, with no local software installation required on IU servers or agent machines.
- **Compatibility with Browsers and Devices:** Zendesk is compatible with Windows, Mac, iOS, and Android browsers, offering a responsive design for all screen sizes and resolutions.
- **Methods/Channels of Communication:** Zendesk supports Voice Calling, Emailing, and Chat/Instant Messaging as required communication channels.
- **Call Recording Capability:** Zendesk provides call recording with at least one year of storage, and its system allows searching and playback of recordings on individual/group/departmental levels.
- **Reporting Capabilities:** Zendesk offers numerous pre-configured reports for the most utilized contact center information, along with customizable ad-hoc reporting for individual call centers across the organization. It supports generating and sending scheduled reports to contact center supervisors.
- **Real-Time Dashboard:** Zendesk provides real-time dashboards that allow supervisors/agents from different contact centers to monitor, manage, and engage with queues and various communication channels.
- **Attendant for Call Routing:** Zendesk's attendant includes recorded menu prompts, text-to-speech prompts, understands voice commands, and allows robust scheduling for call routing.

- **Voicemail and Callback Feature:** Zendesk offers voicemail for individual agents or groups and includes a callback feature that allows callers to schedule callback dates and times.
- **Skills-Based Routing:** Zendesk supports skills-based routing to route communications to the best available agent based on their proficiencies.
- **Built-In Agent Communication Tools:** Zendesk provides built-in communication tools for agents to collaborate instantly via call, chat, screenshare, and coaching/whisper.
- **Integration of Voice Services:** Zendesk offers integration options for voice services, including direct routing with IU on-premises SBC, BYOC, porting numbers, and single sign-on authentication with Microsoft Active Directory/Azure directory services and Duo for multi-factor security. Zendesk can integrate with ServiceNow through screen pop functionality.
- **Licensing and Administration Tools:** Zendesk provides a streamlined licensing process to add/remove agents and features. Its cloud-based system administration tools allow the IU engineering team to review user settings, gather real-time statistics, and troubleshoot.
- **Customer Support:** Zendesk offers customer support, including the ability to escalate critical issues to real-time live voice support.
- **Manager/Supervisor Tools:** Zendesk provides configurable privileges for contact center manager/supervisor tools, allowing them to make changes within their department's contact center. It allows modifications to attendant profiles, user settings, skills, schedules, and more.
- **Physical Phone Integration:** Zendesk can integrate with physical phones and headsets connected to PCs and Macs. A list of compatible phones and headsets can be provided by Zendesk.
- **Self-Serve Training and Knowledge Base:** Millennial Services offers basic self-serve training and knowledge base resources for agents, supervisors, and IU support teams.
- **Service Provider Experience and References:** Millennial Services meets the requirements of having 15+ years experience developing and supporting contact center solutions and cloud versions of CCaaS software in the United States.

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Jim Lunnen - Home Plus Mortgage
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Sheila Reidy - Chicago Sun Times
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Jon Buck - Angie's List Director of Marketing
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Emily McQuilkin - Crain's Business Journal
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- **Demo and Evaluation:** Millennial Services and Zendesk can provide a live demo of its system covering all areas of interest listed in the RFP, allowing the IU team to compare systems and ask questions.
- **Canned Responses:** Zendesk provides robust canned responses for text-based communication, along with search functionality and ease of use.
- **System Updates and Maintenance:** Zendesk handles all system, software, and feature updates, eliminating the need for IU support staff to perform updates or maintenance.
- **Guaranteed Uptime (SLA):** Zendesk guarantees 99.99% uptime, and its SLA includes outage reporting and compensation processes.
- **Stable Pricing:** Millennial Services provides detailed historical pricing trends, outlines future expected price increases, and explains the licensing model and its contribution to the overall cost of the solution/relationship.

Should Include:

- **Additional Methods/Channels of Communication:** Zendesk includes SMS/text messaging, automated assistance/AI capabilities, and can support social media channels and tracking live in-person interactions.
- **Real-Time Accessible Reporting on Licensing Charges:** Zendesk offers real-time reporting on licensing charges.

- **Training and Knowledge Base Resources:** Millennial Services provides numerous training and knowledge base resources, including online and instructor-led options.
- **Extended Call Recording Storage:** Zendesk can extend call recording storage beyond three years.
- **Non-English Language Support:** Zendesk supports Attendant Text-to-Speech for Callers and non-English language client interfaces.
- **Guaranteed Uptime (SLA) and Proactive Alerts:** Zendesk guarantees 99.999% uptime and provides proactive alerts to the IU engineering team in case of system issues.
- **Batch Import Capability:** Zendesk offers batch import capability for records from other databases, with support for various data/file types.
- **Canned Responses Batch Management:** Zendesk allows batch add/modify of information in text response libraries.
- **Administration Tools:** Zendesk provides dashboards and proactive notification tools for system issues, along with historical versioning and logging of changes to settings.
- **Visual Attendant Configuration Tool:** Zendesk offers an intuitive, cloud-hosted, GUI-driven attendant configuration tool using a visual flowchart-like profile builder.
- **US-Based Customer Support:** Zendesk's customer support includes US-based agents and real-time live voice support for critical issues.
- **Additional Integration Options:** Zendesk can integrate with Microsoft Teams, Microsoft Outlook, Salesforce CRM, and proprietary student information systems and CRMs.
- **Real-Time Dashboard Customization:** Zendesk allows customizing agent statuses on real-time dashboards.

May Include:

- **Additional Methods/Channels of Communication:** Zendesk may include one-on-one or group video calls and potentially other communication channels.
- **Gamification:** Zendesk may offer gamification features to encourage agent engagement.
- **Integration with Microsoft Teams and Outlook:** Zendesk may include integration with Microsoft Teams and Outlook for availability status.
- **Temporary Agent License Increase:** Zendesk can potentially allow IU to temporarily increase agent license counts for short-term situations.
- **Artificial Intelligence:** Zendesk may include conversational automated attendants, transcription, and analytics of communication channels with AI capabilities.
- **Live Voice-to-Chat Transcription:** Zendesk may offer live voice-to-chat transcription.
- **Full Integration with ServiceNow and Slate:** Zendesk can fully integrate with multiple implementations of ServiceNow and Slate.
- **Agent Outgoing Number Setting:** Zendesk can potentially allow agents to set their outgoing numbers for calls.
- **Secondary Routing Profiles:** Zendesk may include secondary routing profiles for disaster scenarios.

By utilizing Zendesk's comprehensive features and capabilities, Indiana University can find an all-encompassing CCaaS solution that meets its specific requirements and offers a reliable, efficient, and secure communication and contact center system.

Additional Proposal Requirements:

Point of Contact

Logan Rush
President

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Company Profile

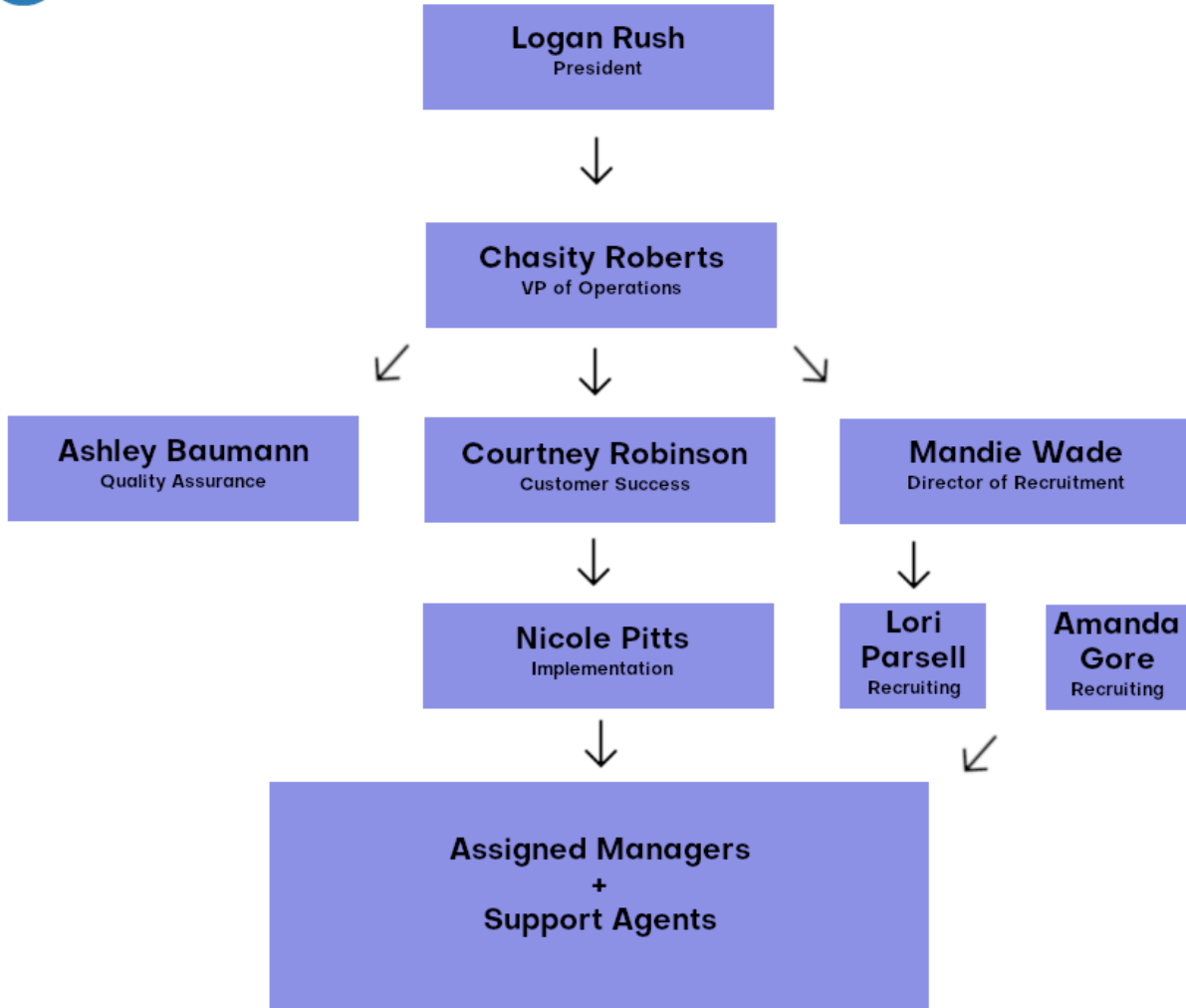
Millennial Services offers outsourced contact center solutions, quality assurance, outbound & inbound call center support, and back office services. The company was founded in February of 2009 by Logan Rush while he was finishing his **degree at the IU Bloomington campus**. Our first client was Angie's List, which tasked Millennial Services with back office work.

Logan founded Millennial Services in 2009 and serves as the company's President. He leads a team of talented managers, oversees infrastructure, develops new relationships and grows existing ones, and has broad oversight of Millennial's operations. Logan has led Millennial's growth since its genesis.

Logan has made a career out of helping companies implement and manage world class customer care with industry leading retention rates and customer satisfaction. His career started in customer care at Angie's List, who eventually became Millennial Service's first client. Under the Millennial brand Logan and his team have built customer care programs in many industries including but not limited to hospitality, insurance, emergency response, e-commerce, and news media for companies like Chicago Sun Times, Great Wolf Lodge, and Prudential Financial.

Methodology

Organizational Chart



Subcontractors

N/A

Timeline

Data Privacy and Security

To ensure data security and compliance with relevant laws and best practices, Millennial Services LLC will implement the following measures:

a. Data Security Measures:

- **Cloud Hosted Data Center:** Millennial Services will use a cloud-hosted data center located in the United States, following software-as-a-service (SaaS) architecture. This ensures that no customer premises require software installations.
- **Secure Encryption:** All communication methods, stored recordings, and data transmissions will be encrypted to protect against threats and unauthorized access. The encryption protocols used will be in line with prevailing commercial best practices and applicable laws.
- **Authentication and Authorization:** Millennial Services will implement robust authentication and authorization mechanisms to control access to IU institutional data, ensuring that only authorized personnel can access it.
- **Incident Detection and Response:** Millennial Services will have security monitoring systems in place to detect and respond promptly to security breaches that may expose IU institutional data to unauthorized use or access.
- **Red Flag Rules Compliance:** If applicable, Millennial Services will have a written program in place to identify, detect, and address warning signs of identity theft, as required by the FACT Act and "Red Flag Rules."

b. Compliance with Applicable Laws and IU Policies:

- **Regulatory Compliance:** Millennial Services will comply with the Safeguards Rule (GLB), HIPAA Privacy and Security Rules, FERPA, PCIDSS (Version 4.0 or latest), FACT Act, IT-12 Policy, GDPR, and any other applicable laws and regulations related to the type of data involved.
- **Data Retention:** Millennial Services will retain and provide authentication and system logs for a minimum of 60 days to facilitate the investigation of security incidents.

- Social Security Numbers (SSNs): Millennial Services and its personnel will not disclose any SSNs received from IU unless required by law or with prior written authorization from IU.
- Breach Notification: In case of a data breach, Millennial Services will notify IU immediately and cooperate fully with IU's efforts to investigate and provide appropriate notice to affected individuals and others as required by law or IU.

c. Data Access and Usage Control:

- Limited Access: IU institutional data will only be accessed and used by authorized personnel within Millennial Services or approved subcontractors who require access to perform activities outlined in the RFP.
- Restricted Sharing: IU institutional data will not be shared with any third party without prior written consent from IU and the individuals whose data is involved.
- Data Usage: IU institutional data will be used solely for the purpose of performing activities specified in the RFP and not for targeted marketing purposes.

d. Personnel Training and Responsibility:

- Personnel Obligations: All personnel and approved subcontractors will understand and comply with data protection provisions outlined in the RFP and the agreement between Millennial Services and IU.
- Training: Millennial Services' personnel will receive appropriate training regarding data handling and security obligations.

Accessibility

Development:

- Millennial Services will ensure that the web applications developed meet the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA by following established processes and providing supporting evidence.
- A percentage of Millennial Services' software development and QA testing team will be focused on accessibility.

Testing & Issue Tracking:

Millennial Services will perform accessibility testing for people with impairments and will describe the testing process in detail.

- Accessibility testing will be conducted prior to each major release of the product.
- Millennial Services will use assistive technologies to evaluate access for people who are blind or visually impaired and will provide evidence of the testing process.
- Millennial Services will have a policy and process to respond to accessibility errors in applications under development and production environments.
- Accessibility issues will be tracked and prioritized to address them promptly.

Service Provider Internal Training:

Millennial Services' developers and project managers will receive regular accessibility training to ensure compliance.

Support:

Millennial Services will have a designated accessibility representative to address issues or questions and provide oversight related to accessibility. Customers will be informed of accessibility errors using appropriate methods.

By implementing these measures, Millennial Services will ensure data security, regulatory compliance, and accessibility for IU institutional data and customers.