

BILL NO. S-14-10-15

SPECIAL ORDINANCE NO. S-_____

AN ORDINANCE approving SUPPLEMENTAL RIDER TO NORTH AMERICAN COMMUNICATION RESOURCE (NACR) MASTER AGREEMENT - INTEGRATE CITY UTILITIES INTERACTIVE VOICE RESPONSE (IVR) AND DIALER TO OUR NEW CUSTOMER INFORMATION SYSTEM (CIS) between NORTH AMERICAN COMMUNICATION RESOURCE and the City of Fort Wayne, Indiana, in connection with the Board of Public Works.

NOW, THEREFORE, BE IT ORDAINED BY THE COMMON COUNCIL OF THE CITY OF FORT WAYNE, INDIANA:

SECTION 1. That the SUPPLEMENTAL RIDER TO NORTH AMERICAN COMMUNICATION RESOURCE (NACR) MASTER AGREEMENT - INTEGRATE CITY UTILITIES INTERACTIVE VOICE RESPONSE (IVR) AND DIALER TO OUR NEW CUSTOMER INFORMATION SYSTEM (CIS) by and between NORTH AMERICAN COMMUNICATION RESOURCE and the City of Fort Wayne, Indiana, in connection with the Board of Public Works, is hereby ratified, and affirmed and approved in all respects, respectfully for:

All labor, insurance, material, equipment, tools, power, transportation, miscellaneous equipment, etc., including software, hardware and programming necessary for supplemental rider added to the master agreement to enable both the Utilities Call Management System and its Interactive Voice Response (IVR) to work with our new CIS system.

involving a total cost of ONE HUNDRED SIXTY-EIGHT THOUSAND, FORTY-

1 EIGHT AND 08/100 DOLLARS - (\$168,048.08). A copy of said Contract is on
2 file with the Office of the City Clerk and made available for public inspection,
3 according to law.
4

5 **SECTION 2.** That this Ordinance shall be in full force and effect
6 from and after its passage and any and all necessary approval by the Mayor.
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9 _____
10 Council Member

11 APPROVED AS TO FORM AND LEGALITY
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14 _____
15 Carol Helton, City Attorney
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City of Fort Wayne - Utilities
CIC IVR & Dialer Redesign Professional Services
Scope of Work

Prepared by:

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National Account Manager
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ATucker@nacr.com

Pricing effective 30 days after proposal date of

6-Oct-2014

Version - 2

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Requirements Overview

The intent of this proposal is to define the scope of services NACR will provide City of Fort Wayne - Utilities to redesign and implement the IVR and Dialer components for the City Utilities in conjunction with implementation of the CIS Infinity (CIS) utilities management system as per the pricing schedule provided in the separate NACR quote.

This proposal covers the actual redesign, configuration and testing of the IVR and Dialer function of the existing Interactive Intelligence CIC system. Complete implementation requires the CIS Integration as defined and proposed in the separate NACR SOW – City Of Fort Wayne – Utilities CIS Integration Version – 2, dated 8-Sep-2014.

This Scope of Work ("SOW") is subject to the terms and conditions of the Master Agreement, dated Date, between NACR ("NACR") and City of Fort Wayne - Utilities ("CLIENT"). The offer of this SOW is effective on Date and expires thirty (30) days from the last revision date of this document.

Actual date for the delivery of these services is depends upon CLIENT's acceptance of the Master Agreement and this SOW. To accomplish these objectives, NACR will provide the Professional Services resources required to accomplish the work as defined below. NACR will communicate with CLIENT's Project Manager, the appointed Point of Contact for CLIENT on this project. He/She will be responsible for all communications and project management among all client parties (staff, vendors, consultants) and for the escalation and resolution of any issues for CLIENT.

This SOW is intended to provide deliverable goals and system functionality for CLIENT. A significant portion of this project is dependent upon the joint design and team commitment between NACR and CLIENT. CLIENT should expect professionalism and commitment from the NACR team.



Scope of Project

NACR Proposed Solution and Design Overview

NACR will provide the professional services resources required to design, implement, test and put into production the following redesign and enhancements of the CIC IVR, Dialer and Contact Center for the Fort Wayne City Utilities.

The redesign of the Interactive Intelligence Customer Interaction Center solution includes:

- Integration to the new CIS Infinity (CIS) utilities management system
- Redesign of IVR call flows
- Real-time Customer payment options
- Customer's Account Lookup
- CIS Screen Pop for CSR's
- Speech Enabled IVR
- Redesigned Outbound Collections Dialer
- Specialty Outbound Agentless Dialer Campaigns
- Web Chat Interactions

Project Details

The following provides details relating to various redesigns and enhancements NACR will implement for City of Fort Wayne Utilities as components of this SOW.

Note that many of the enhancements detailed require the combined efforts of NACR's CIC team, NACR's AppDev team as well as the CIS Infinity system and Advanced Utilities Systems to implement and deliver.

NACR is fully committed to the cooperative efforts required to collaborate with City Utilities and AUS to deliver the functionality defined in this SOW



Automated Attendant & IVR Processing

Per the requirements as defined by City Utilities in their "NACR Outline of Improvements" document dated 7/30/2014. NACR will provide the professional service to design, implement, test and put into production the following.

Press 2 to go to IVR: (system attempts to identify customer from incoming phone number)

- Option to get account information:
 - Customer required to enter "customer number" to get information about their account: Include customer validation routine to establish "Identity"
 - If customer has more than one account, give them option to select correct account
 - Provide amount past due, current amount, and total due
 - Allow customer to select payment option at end of account information option (see next section for steps)
- Option to make a payment
 - Customer can select checking, savings, credit card, or debit card
 - Customer determines amount to be paid (and possibly schedule future date)
 - If payment with credit or debit card, Inform customer of process fee
 - Assumes a flat processing fee for all credit or debit card transactions
 - Customer makes payment and put on hold while payment is processed
 - IVR will interface seamlessly to a third party payment provider
 - IVR will relay the third party's confirmation number (received from payment provider if approved or the denial, If payment is not approved)
 - Ensure that the third party vendor's processing routine includes real time posting to accounts in CIS and not on the confirmation number on the accounts
- Option to talk to a Customer Service Rep:
 - Allow customer to press 1 during business hours if they want to speak to a CSR
 - If no other options are selected, default (wait) to speak to CSR
 - Allow customer to press 1 after normal business hours to leave a message for return call the following business day
- Phone system searches CIS for the Incoming phone number
 - Require customer to verify if number is correct for the account attached to the phone number
 - Provide customer validation routine



- Screen pop when CSR is prompted to take incoming customer call providing the account number that the customer is calling about
- Option to hold a place in line for the customer to have a call returned to them when it is their turn to speak to a CSR
- Accept wrap up codes and prepare report summaries
- Include a posted note to each CIS account regarding the call
- Performance tracking reports by call taker
- Manage, record, archive and retrieve calls
- Maintain existing call functionality

Dialer

Per the requirements as defined by City Utilities in their "NACR Outline of Improvements" document dated 7/30/2014. NACR will provide the professional service to design, implement, test and put into production the following.

Collector Accounts:

- CIS system creates call file for delinquent accounts
- Campaign set to run at 3:00 pm daily (may vary; programmable by user)
- "Just in Time Lookup" to verify account still delinquent before call is made
- Call is made and if someone answers they get information about amount owed; and
 - Option to make a payment
 - Option to talk with a CSR during business hours
 - Option to leave a message if calling after business hours
- Call phone number again if phone is busy; call again if no answer
- Provide stats on outcome of all calls made

Specialty Campaigns:

- Ability to store canned messages to be selected by user to match the purpose of each dialer campaigns targeted audiences, i.e., water quality alert for customers in proximity of a main break, etc. City will develop the GIS functionality to identify target customers and deliver the phone numbers to CIC system
- Assumes a maximum of 4 unique campaigns will be created.



Contact Center Description

Per the requirements as defined by City Utilities in their "NACR Outline of Improvements" document dated 7/30/2014, NACR will provide the professional service to design, implement, test and put into production the following.

- NACR will enable Fort Wayne Utilities to conduct online "chat" interaction with customers.
 - NACR will assist in determining the appropriate deployment of chat functionality within Fort Wayne's call center
 - A transcript of the "chat" will be posted to the appropriate account in CIS
- NACR will implement and configure the CIC side of the Web Chat feature. Including basic Web Chat configuration, initial information request from Customer.
- City of Fort Wayne will be responsible for all programing and changes to the web site and web pages to support Web Chat as well as the iIS Web Server.

Additional components included to support Web Chat:

- Upgrade of (10) Contact Center Level-2 to Contact Center Level-3 Agents
- Up to 4-hours of End-User Agent & Supervisor training for Web Chat

Advanced Speech Recognition

Per the requirements as defined by City Utilities in their "NACR Outline of Improvements" document dated 7/30/2014, NACR will provide the professional service to design, implement, test and put into production the following.

- Fort Wayne City Utilities wants to have voice recognition offered to our customers throughout the system prompt options.
- NACR will implement (46) Ports of Nuance Recognizer Tier-2 Advanced Speech Recognition software for both English & Spanish speech recognition.
- NACR will implement the Nuance speech recognition on City of Fort Wayne provided virtual servers.
 - Virtual Server requirements will be provided by NACR in separate documentations.
- NACR will make the appropriate changes in the Automated Attendant and IVR to provide callers with the option for speech recognition or DTMF input.



Additional Requirements

Per the requirements as defined by City Utilities in their "NACR Outline of Improvements" document dated 7/30/2014. NACR will provide the professional service to design, implement, test and put into production the following.

- Have NACR help with scripting (of call flows)
- Have NACR suggest best practice options to give customer best experience

Assumptions

The following are assumptions that have been made and reflect the requirements and professional services proposed by NACR.

- City of Fort Wayne will provide necessary voice talent and related studio time, if necessary, at City of Fort Wayne's expense for the production of all project related .WAV files for use as system prompts. The format for WAV files must be CCITT μ -Law, 8 bit, 8 kHz, Mono. Not stereo, and not 16 or 32-bit.
- At the time of implementation the current CIC system will not be in the process of migrating to IC 4.0.
- City of Fort Wayne has signed for the NACR AppDev SOW for the CIS Integration aspect of this overall project.

Client Requirements

Operational Requirements:

- CLIENT will provide a main point contact throughout entire project life cycle.
- CLIENT will provide necessary voice talent and related studio time, if necessary, at CLIENT's expense for the production of all project related .WAV files for use as system prompts. The format for WAV files must be CCITT μ -Law, 8 bit, 8 kHz, Mono. Not stereo, and not 16 or 32-bit.
- CLIENT will be responsible for administration and back-up of all network, system and database infrastructure during and after the implementation. Databases used in this application may include the databases established for CIC reporting, configuration, etc. and other databases that may contain data used for the various contact center applications.



- CLIENT will provide necessary access to the installation areas including the removal of furniture or other structures obstructing the installation areas if required. Removing or relocating existing client services by NACR is not within the scope of this Agreement.
- CLIENT will provide all required cabling, cross-connect materials, conduits, cable management, and installation of these materials. NACR will make every attempt to provide neat wiring bundles using wire ties for installed servers and components. If additional cable management materials or hardware are desired, CLIENT may engage NACR to provide these materials and services; additional fees may apply. If CLIENT provides the cable management infrastructure at the time of hardware installation, NACR will route wiring through the provided conduit whenever possible.

Technical Requirements:

- CLIENT should refer to Interactive Intelligence Test Labs web site for a current listing of supported software and hardware for all "client provided" or "client to provide" software and hardware, including workstation OS. Test Labs website: <http://testlab.inln.com/>
- CLIENT is responsible for providing and installing any virus protection software, setup exclusions as required by Interactive Intelligence, and scan the server for viruses per Customer's schedule and method. It is not recommended by Interactive Intelligence that the xIC server host a virus scanning software but can be a client of such.
- CLIENT will provide access to internal infrastructure throughout IC Implementation including, but not limited to, database servers, email servers, directory servers, and other system data repositories or application servers.
- CLIENT will see that the Servers, Operating Systems, LAN/WAN connectivity will be operational and access made available at the beginning of the project. NACR can provide CLIENT with audit review and consulting services related to the proper Server Operating Systems and hardware, etc., to be used for this system. Additional fees may apply.
- CLIENT will provide a LAN environment that is 10/100 base-T Ethernet configured for the TCP/IP protocol. The LAN environment must be able to support the desired QOS standards required for IP Voice.
- CLIENT will be responsible for keeping regular back-ups of the system. NACR strongly encourages CLIENT to have two or more reliable backups of everything on CLIENT's system.
- CLIENT will provide an adequate work/test environment for NACR consultants, including workspace, network and Internet connectivity and telephone. The location for the work/test environment is typically located in close proximity to where the CIC solution servers will be installed.
- CLIENT will provide the rack space, network connections, cable management hardware if desired, connection hardware and cabling, required power access, a KVM, and a suitable environment for the servers.



Implementation Assumptions & Responsibilities:

- Engineering or configuration changes made by CLIENT after project initiation may affect the agreed-upon project schedule and will require a project review to determine impact and schedule requirements.
- NACR personnel will have unrestricted access to work areas as needed, to be arranged with the designated client contact.
- NACR is not responsible for the performance, quality, or delays caused by third-party vendors hired by CLIENT. Additional professional services may be required should on-site work be delayed based on third-party vendors.

Scope of Work Acceptance

Signatures below acknowledge that CLIENT has read and accepted the terms and conditions stated herein. NACR and CLIENT each represent that the individual signing this SOW on its behalf has the power and authority to enter into the agreement defined in this SOW, and that this SOW constitutes a valid and binding obligation of each party.

NACR

SIGNATURE:

Richard P. Bourdow

PRINTED NAME:

RICHARD BOURDOW

TITLE:

Regional Vice President

DATE ACCEPTED:

10/6/14

CLIENT:

City of Fort Wayne

SIGNATURE:

Len Pochner

PRINTED NAME:

Len Pochner

TITLE:

Deputy Director, Utilities

DATE SIGNED:

10/6/14

IN IN C:\CLO SOW_NACR Ver-3_20140417.docx



Attachment B

Rider Number: QUO-091002-YZWWWR
Date: 9/8/2014
Page No.: Page 1 of 2
VCP Cust: YES
VCP ID #: 0009999991

Master Agreement Rider

IVR & Dialer Redesign V2

Bill To: City of Fort Wayne
Attn. To: James Haley
Address: City Utilities of Fort Wayne
200 E Berry St. Suite 415
Fort Wayne, IN 46802

Ship To: City of Fort Wayne
Attn. To: Maggie Fielder
Address: City Utilities of Fort Wayne
200 E Berry St. Suite 415
Fort Wayne, IN 46802

Customer P.O.: Customer ID Master Agreement No. Shipping
CITFOR0001 G3M1123 UPS GROUND

Payment Terms National Account Manager
Name: Angela Tucker
E-Mail: ATucker@NACR.com
Phone: +13178766531

Description	Quantity	Unit Price	Ext. Price
ININ Software			
SW-001-4.0-ULA6 - CC2 upgrade to CC3	10.00	\$402.50	\$4,025.00
Speech Recognition Services	1.00	\$3,750.00	\$3,750.00
SW-001-4.0-SA08 - MRCP ASR Feature License	1.00	\$5,000.00	\$5,000.00
TS-500-4.0-T2BL10 - Nuance Recognizer 10 Tier 2 Base Language Port	46.00	\$1,100.00	\$50,600.00
TS-500-4.0-T2AL210 - Nuance Recognizer 10 Tier 2 - Additional Port for 2nd Language	46.00	\$220.00	\$10,120.00
ININ Software Sub-total:			\$73,495.00
Professional Services			
SERVICES	1.00	\$92,459.00	\$92,459.00
Professional Services Sub-total:			\$92,459.00
ININ Support			
ININ Standard Support	1.00	\$1,971.13	\$1,971.13
ININ 3rd Party Support	1.00	\$9,368.85	\$9,368.85
ININ Support Sub-total:			\$11,339.98

Please see attached Scope of Work "CIC IVR & Dialer Redesign Professional Services v2" for details surrounding this quote. This Agreement and NACR Quote "NACR CIS IntegrationQuote QUO-074307-PPQZY0" in conjunction with corresponding SOW's are both required for a complete solution.

*QUOTE VALID FOR 30 DAYS

*PRICES ARE SUBJECT TO CHANGE WITHOUT NOTICE

Terms and Conditions of the Master Agreement Apply

This order is a configured order and/or contains software.

Subtotal: \$177,293.88
Discount: \$9,245.80
Tax: Not Included
Freight: Not Included
Grand Total: \$168,048.08

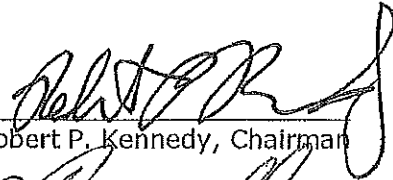
Accepted By: [Signature] Date: 10/6/14
Buyer: [Signature]
Title: Deputy Director - Utilities

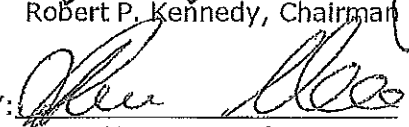
Seller: [Signature] Date: 10/16/14
Title: RVP

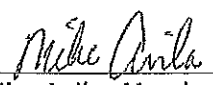
Professional Services Agreement between the City of Fort Wayne and North American Communication Resource for Utilities Customer Voice Response System Assistance.

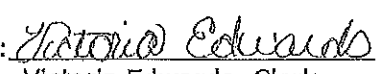
BOARD OF PUBLIC WORKS

Date: October 8, 2014

BY: 
Robert P. Kennedy, Chairman

BY: 
Kumar Menon, Member

BY: 
Mike Avila, Member

ATTEST: 
Victoria Edwards, Clerk

Interoffice Memo

Date: **October 9, 2014**

To: **Common Council Members**

From: **Len Poehler**, Deputy Director Business Services, Fort Wayne City Utilities

RE: Supplemental Rider to North American Communication Resource (NACR) Master Agreement - integrate City Utilities Interactive Voice Response (IVR) and Dialer to our new Customer Information System (CIS)

NACR supports the entire City's "Voice Over Internet Protocol" phone system and the City has a Master Agreement with NACR. This Council action will add a rider to the master agreement to enable both the Utilities Call Management System and its Interactive Voice Response (IVR) to work with our new CIS system. The Utility's call center fields over 150,000 calls each year. All of these calls plus over 50,000 customer payments go through the IVR system. NACR will provide software, hardware and programming for features such as:

1. Screen pop which is software and programming that automatically pulls up a customer's account based on the incoming phone number, saving customer time and boosting productivity.
2. The ability to automatically store and catalog all calls by type for analysis and improved call management.
3. Provide chat functionality through our website.
4. Post the results of all outbound dialer transactions at the individual customer level and aggregate the totals for trend analysis.
5. Allow our customers to connect seamlessly to our internet banking partner to accept payments initiated through our IVR call-in number

All data and transactions will be processed in real time so that customers will have more accurate information. Payments will be applied immediately, helping customers avoid late fees and other inconveniences.

This work is important to the success of our CIS implementation. The modifications are priced at a fee of \$168,048.08.

CC: BOW
Kumar Menon
Diane Brown