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# Advanced Customer Service Management Solution Proposal

How smart systems can help your employees be more customer-centric.

**Presented to:**

John Smith  
Procurement Director  
XYZ Corporation, Inc.  
123 ABC Avenue

**Prepared by:**

George Doe  
VP, Sales  
Elucida Business Solutions Group, Inc.  
123 ABC Avenue



George Doe  
VP, Sales  
Elucida Business Solutions Group, Inc.  
123 ABC Avenue

John Smith  
Procurement Director  
XYZ Corporation, Inc.  
123 ABC Avenue

RE: Advanced customer service management solution proposal

Dear Mr. Smith,

We would like to thank XYZ Corporation for inviting us to submit a proposal for an advanced customer service management solution to help your employees be more customer-centric and to help you deliver world class service to your customers.

Based on outline in your RFP document, we believe that our firm is the right choice for you for the following reasons:

- ▶ **Our knowledge of customer service management systems**—and our track record of implementing those systems across industries—will allow us to hit the ground running
- ▶ We have **carefully evaluated the skills and expertise that you need** and we have identified a team we know will execute the solution to your specifications, made up of knowledgeable and experienced client focused professionals
- ▶ We will use **established methodologies to execute the mandate**, specifically designed to help ensure that we will focus on the issues that will have the maximum effect on your service delivery levels
- ▶ We are committed to **communicating with with you throughout the lifetime of the project** implementation phase—and on an on-going support basis thereafter
- ▶ We are determined to **provide you with the best possible solution** for your specified budget

We aim to provide a level of service that brings you strong value for your investment and exceeds your expectations. We are available to answer any questions you might have and would welcome the opportunity to discuss our offer with you in person.

Yours truly,

*George Doe*

George Doe

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# Executive summary

## A solution tailored to the needs of XYZ Corporation

The proposal for an advanced customer service management solution we have built for XYZ Corporation is founded on the concept of seamlessly integrating the different aspects of your customer services functions through technology, innovation and expertise. We propose a solution that will provide your employees with a user-friendly and simple process that drives internal—and therefore, external—engagement.

## A customer-first architecture

We know that your employees can find customer service management daunting—especially when they have many options and decisions to make. Our proposal supports your employees every step of the way to make sure they are always well informed of the customer’s needs and able to make the best decisions for that customer’s reality. We offer the following key benefits that will have a positive impact on your customers:

- ▶ **Interactive tools** educate employees and help them understand the background of each customer
- ▶ **“Build your own” scenarios** give employees the ability to offer the customer multiple options for issue resolution
- ▶ **Access to a complete history for each customer** to help employees understand the background related to any customer question and the ramifications of any decision they may take
- ▶ **Automatic notification** that informs employees when a situation occurs that could impact a customer, allowing them to be proactive and take steps to manage the process

## A supportive employee environment

Our system is built to support your employees from their first day of work with a small customer to the day when they are a VP dealing directly with customer decision makers. We offer the following for your employees:

- ▶ **Targeted ongoing communication** throughout the employee’s journey with different customers
- ▶ **Access to digital resources** including online education modules, videos and tools
- ▶ **Ongoing education sessions** which use behavior analysis to tailor presentations to employee needs
- ▶ **One-on-one time with licensed education representatives** for employees who need further guidance

## A versatile solution for XYZ Corporation

Our proposal is a comprehensive offering which covers every aspect related to advanced customer service management. It has been designed to be versatile: it can either be implemented as a complete solution to take maximum advantage of the benefits of full integration, or any of the individual services can be implemented separately. No matter what you choose, you will be well-positioned to provide your customers with outstanding customized service. Our proposal illustrates the strong fit between our organizations, and shows how we have taken the time to precisely understand your needs. We look forward to meeting with you in person in the near future to discuss our solution which will help you further differentiate yourself from the competition.



## Fact sheet

### Company history.

Elucida Business Solutions Group was founded in 2008, and now has offices in 12 countries. We are known as advanced customer service management experts and we have a reputation for working with our customers to give them the solutions that are right for their organization.

### Core business.

Tools and resources that allow companies to offer the best customer service experience possible.

### Ownership.

Elucida Business Solutions Group is an international company traded on the NYSE with a total market value of over \$1.2 billion US.

### The numbers.

- ▶ **2,000+** customers
- ▶ Over **1,700** employees
- ▶ **1,245%** customer growth rate (2014 to 2015)
- ▶ Credit rating of **A+**

### Competitive advantages.

- ▶ **Competitive advantages for our customer's employees.** Flexible customer service tools; rich communications materials; customizable dashboards and powerful personalized online education.
- ▶ **Competitive advantages for our customers' customers.** Near-zero wait time; dedicated customer service resources; support with all facts of the customer's business; powerful problem solving.

### Guarantee.

We offer a 100% customer satisfaction guarantee. No matter how large the project is, if you're not 100% satisfied with the implementation and our system's functionality, we will reimburse you fully.

### Contact.

Elucida Business Solutions Group, Inc.  
123 ABC Avenue  
Phone : 555 123-4567, Fax.: 555 123-4567  
[www.elucidabsg.com](http://www.elucidabsg.com) / [info@elucidabsg.com](mailto:info@elucidabsg.com)

# 1.0 An expert solution

98%

of our implementations are executed on time.

Your Implementation Manager is there to manage the transition process.

Your Customer relationship manager is there to help you when you have a question.

## 1.1 A full suite of services

We can offer you a full suite of services unmatched in the industry. From implementation to reporting to support, our service is based on the principle that it should be easy to offer your customers excellent customer service. Our solution includes the following:

- ▶ Implementation management
- ▶ A single point of contact
- ▶ A centralized administration tool
- ▶ Powerful reporting
- ▶ A total customer satisfaction guarantee

## 1.2 Implementation management

The launch of your solution with us will be managed by a dedicated senior implementation manager. They will have overall responsibility for the transition process and will be your main contact. Your senior implementation manager will bring in the resources to facilitate the transition including systems specialists, documentation experts, and administration specialists. The individuals we have selected all have experience with on-line retail customers—so they know your industry well.

We believe that communication plays a big role in a successful transition. We will find the balance that is right for your organization by doing the following:

- ▶ Holding regular status meetings
- ▶ Working with you to establish a member communication strategy in line with your culture and realities
- ▶ Determining what to communicate, when and how
- ▶ Establishing the look and feel of enrolment material including announcement notices, enrolment kits and custom presentations
- ▶ Providing administrator training and support

## 1.3 A single point of contact

We know that every client is different, and that every client relationship requires a tailored approach. To make that possible, every client is assigned a Customer relationship manager (CRM). Your CRM is there to help you with the day-to-day

administration of your solution. They are your dedicated contact, and they are there to support you, answer your questions and interface with us on your behalf.

We work hard to make sure that we pair the best possible customer relationship manager (CRM) with each client. In your case, we will be assigning a CRM who has years of experience providing online retail customers with with a high level of consistent, proactive service.

99%

of our customers say our service is “exceptional.”

## 1.4 A centralized administration tool

Customer service is successful when employees are empowered. To address this reality, we developed our Premier eService platform. This web-based tool provides complete self-service functionality for the customer service tasks that employees perform on a daily basis. It also offers online training, customer information, as well as access to an education program and its suite of materials. The user-friendly website is divided into four main sections:

- ▶ **History.** This section allows employees to access the fully history of customer service contact points for a customer, allowing them to understand where a customer is coming from and how issues were resolved in the past.
- ▶ **Administration.** This section allows employees to access to the tools necessary to manage existing client information and set up new client profiles.
- ▶ **Scenarios.** In this section, we provide all the tools and information employees need to run different scenarios based on client history and see the probability of full customer satisfaction for different approaches.
- ▶ **Reports.** This section allows employees to print or save a variety of reports. Any specialized reports specifically developed for you would be available for download in this section.

For a demo of our Premier eService platform, please visit:

[www.elucidabsg.com/demo](http://www.elucidabsg.com/demo)

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different reports are available to help you optimize customer service.

## 1.5 Powerful reporting

We have exceptional—and flexible—reporting capabilities and we already have many reports which have been specifically developed for the online retail market. Most reports are immediately available through Premier eService at any time, or they can be requested by contacting your Client Relationship Manager. We can also offer you customized reports if you have requirements that are specific to your company. The majority of our reports are available in both electronic and paper formats. Here are some of the reports we offer:



- ▶ Issue resolution report
- ▶ Customer call-in activity report
- ▶ Resolution effectiveness and efficiency report

## 1.6 A total customer satisfaction guarantee

Our proposal includes a customer satisfaction guarantee. The guarantee stipulates that if you are not 100% satisfied with our solution and the implementation of our solution, we will reimburse you for all directly related costs incurred by your organization. We are happy to say that in your entire history, we have never had to reimburse a single client in the online retail industry.

**\$0.6b**

was the R&D budget for our company last year.

## 2.0 Commitment to technology

### 3.1 Overview

Technology is part of everything we do. It helps us offer the best solutions to our customers and it helps us find innovative ways of supporting the customer service function.

Our technology is centered around two key areas:

- ▶ Security
- ▶ Systems and software

### 3.2 Security

Security is a key concern for any company. We take every measure possible to make sure our systems protect the data that belongs to you and your customers. Every facet of security is carefully considered and planned for, from website security to physical security at your facilities.

Here are some key points of our security system:

- ▶ We apply a rigorous process of server security management
- ▶ The security information is correlated and analyzed for use by our security operation center
- ▶ All external accesses to web applications are encrypted using the latest available technology.

### 3.3 Systems and software

We are committed to sustained investment for the improvement of systems and software that our customers use every day. This is on top of the investments we make in upgrades and enhancements to our technology infrastructure. This dedication to enhancement has allowed us to:

- ▶ Build an industry leading web interface
- ▶ Develop an award-winning reporting
- ▶ Integrate information across digital platforms

**93%**

is the proportion of our customers who have renewed their licenses at least once.

# \$97m

was spent on  
website  
optimization last  
year.

We know that planning for the systems in the future has to start today. That belief drives significant investments in systems and software development.

Our major future initiatives include:

- ▶ Developing small customer products
- ▶ Offering better management information to our clients
- ▶ Increasing automation to be more efficient

Our investments in IT are strategic and well thought-out. We look at our wide range of systems, and we consider many different scenarios when planning when and where to invest. It's a complex process, but the result is a seamless experience for the client.

We do the hard work on the backend so that the frontend experience is cohesive and user-friendly.

## 3.0 Key project team members

100%

of the team we assign to your project will have worked on at least 5 projects of similar size.

### 3.1 A team with strong credentials and experience

Our proposed team is excited about the opportunity to work with you. The team members we have selected to serve you on this project bring a broad spectrum of relevant experience related to the world on online retail. They have also demonstrated ability to carry out a successful mandate.

### 3.2 Subject matter experts there to support you

The core implementation and support team is further supported by Subject Matter Experts (SMEs) who were chosen for their specific experience in areas related to online retail. These SMEs will leverage their wealth of knowledge, ideas and insights, providing a continuous focus on a smooth and efficient implementation.

As an international firm, Elucida has the ability to draw on resources and knowledge from across the country—and around the world—to obtain the best, most accurate information for your needs. Specifically, all engagements will be coordinated through our local office which is located less than 30 minutes from your corporate headquarters. This will help ensure that you receive our very best attention and service. Any changes to core team members will be communicated and agreed with XYZ Corporation.

3/4

of SMEs have a master's degree or PhD in their specialty.

### 3.3 Core team members

#### **Mary McFee** **Implementation Manager**

Mary's primary responsibility will be to lead the implementation of your solution, including ensuring quality service every step of the way. She will monitor delivery of services and will meet with your key people when required.

As the leader of our online online servicing division, Mary has strong credentials and experience in working with internet retail companies. With over 12 years of implementation experience for online customers, she understands the current issues and trends in the online world.

Prior to joining Elucida in 2007, Mary served as an Assistant Implementation Manager for a IT services company. Suzanne provides implementation services to both B2B and B2C clients.

#### **John R. Leopold** **Customer Relationship Manager**

John will ensure that your solution runs smoothly and meets or exceeds your standards. He will be accessible to your key team members on a near-full-time

basis to resolve issues. He will also work closely with other team members to identify key issues and opportunities, and develop recommended solutions.

Reason for inclusion in core team:

John specializes in assisting clients who are part of the online retail world. He has significant experience in providing a wide range of servicing to our customers, and has received many recommendations. Prior to joining Elucida, John served as a Customer Relationship Manager for a national retailer.

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the number of customer service awards we've won in the last 5 years.

### 3.4 Subject matter experts

**Sam Jamie**

Retail Planning  
Consultant

**John Franks**

Online Implementation

**Eli Johnson**

Call Center Specialist

**Mike Noel**

Communications  
Specialist

**Percy Simpson**

Online Consultant

**Johnny Mittal**

Implementation Quality  
Manager

**Montgomery Heem**

Major Clients Manager

**Addie Opel**

Online Retail Consultant

**Mitch Mitchell**

Online Servicing  
Consultant

**Whitney McGill**

Change Consultant

**Alfonso Gossi**

Implementation  
Director

**Conrad Hogan**

Senior Implementation  
Manager

**Kristen Itochuk**

Senior Retail Products  
Manager

**Di Tupper**

Senior Returns Manager

**Quinn O'Malley**

Senior Retail Servicing  
Manager

**Pat Vivian**

International Servicing  
Manager

**Wayne Briggs**

Director, Retail Planning

## 4.0 RFP Response

### 4.1. How long does it take to implement your system and make it operational?

It takes approximately 90 days to implement our system and make it operational.

### 4.2. Describe your IT architecture and infrastructure?

Our solution is built on Microsoft and Linux services. The external DNS provides CDN services and DDoS protection. Web servers are deployed in DMZs that are separated from the private networks by firewall restrictions. Database servers are deployed in dedicated safe networks that are not permitted access to or from the Internet. Multiple datacenters support the delivery of the platform. Ancillary services are set up across multiple availability zones to ensure high availability.

### 4.3. How is data stored and managed?

Data management is a core strength of the Elucida solution. We can accept and deliver daily data feeds with no limitations on data size or data format. We can securely receive and process large data sets from multiple sources and disseminate it to the appropriate sources.

### 4.4. Describe your compliance process, procedures and protections?

Elucida is fully compliant with all standards. We have consulted (and continue to consult) with our internal and external experts, and take steps to ensure that we continue to be compliant with all required standards.

### 4.5. What is your typical platform update cycle?

Our product development follows the lean and agile methodology, which allows us to make updates about every four weeks. Many of these changes will go unnoticed by the end user, but for those that do, a notice is sent to administrators before the changes are implemented.

### 4.6. What is your ability to integrate with enterprise systems?

We can integrate with the system of any third party, through either receiving or uploading data. Our platform can securely receive and process large data sets from multiple sources and disseminate it to the appropriate sources. We do not have any limits on data size or data format.

### 4.7. Describe how the platform can be used to deliver coaching to individuals who are involved in customer servicing?

We offer one-on-one and virtual coaching to all employees who are involved with customer service, each according to their personal needs. Through this intense interactive process, coaches get to know employees and how their specific role can help the customer experience. As a result, coaches establish themselves as trusted advisors, advocates and catalysts for customer relations. Coaches “weave” a variety of coaching principles into a unique “web”, or coaching regime to meet the unique needs of each person coached.

### 4.8. What capabilities and options does your solution have for measuring success?

Outcomes, goals, achievements and improvement are tracked in our reporting platform. XYZ Corporation can view progress on areas such as response time, resolution rate. Also, your own self defined interests and goals that can be inputted through the platform.

#### **4.9. Provide examples of how you visualize data.**

We offer a simple dashboard for non-technical users to view reports. This dashboard gives managers a snapshot into overall solution metrics as well as individual solution progress.

#### **4.10. What type of dashboard reporting features do you provide?**

Our reporting solutions for clients deliver insights into solution success, allowing clients to understand how their solution is performing and highlighting opportunities for continued improvement. Our reporting options include the following:

- ▶ Customer service activity
- ▶ Employee rewards
- ▶ Risk factors
- ▶ Monthly year to date data
- ▶ Solution highlights
- ▶ Service trends
- ▶ Engagement trends
- ▶ Automated recommendations
- ▶ Next steps recommendations