Canada Revenue Agency

Agence du revenu du Canada

Request for Information

No. 1000355513

Enhanced Call Analytics

For

The Canada Revenue Agency

Closing Date and Time: 11:59PM (EST), January 11, 2021

Disclaimer

Responding to this Request for Information (RFI) is not a prerequisite to receiving or being eligible to bid on any Request for Proposal (RFP) for this requirement. Any RFP will be advertised on the Government Electronic Tendering Service (GETS) commonly referred to as Buy and Sell (https://buyandsell.gc.ca/).

This RFI is not to be construed as a solicitation for tenders or proposals. No contract or other form of commitment will be entered into based on responses to this RFI. This RFI is not considered as authorization by the Canada Revenue Agency (CRA) to undertake any work that would result in costs to CRA.

Nothing in this RFI shall be construed as a commitment from CRA to issue an RFP for this program. CRA may use non-proprietary information provided in its review and/or in the preparation of any formal RFP. All responses will be held by CRA on a confidential basis (subject to applicable federal legislation) and remain the property of CRA once they have been received. CRA may reproduce or photocopy or transcribe the response and any non-proprietary supporting documentation for the purpose of its review and/or inclusion in any resulting RFP document. Vendors responding to this RFI are advised to clearly identify which (if any) portions of their responses are proprietary and may be invited to a meeting to further clarify their responses to questions provided in Appendix A herein. The confidentiality of each vendor's response will be maintained.

CRA shall not be bound by anything stated herein. CRA reserves the right to change, at any time, any or all parts of the requirements, as it deems necessary. CRA also reserves the right to revise its procurement approach, as it considers appropriate, either based upon information submitted in response to this RFI or for any other reason it deems appropriate.

Interactive Demonstration Sessions

CRA may at its sole discretion entertain presentations/demonstrations with interested vendors to provide them with the opportunity for a follow-up to their written response to present their capabilities in relation to this RFI.

Vendors that have expressed such interest and have demonstrated via their response to the RFI that their products(s) correspond sufficiently to the product questions as stated herein may be contacted within two weeks of the RFI closing date to schedule the demonstration.

The demonstration can be on site at a CRA office located in the National Capital Region (NCR) or remote utilizing audio and/or video conferencing tools such as WebEx. The time frame for each session will be a maximum of 2 hours.

Responses and Enquiries:

Responses for questions must be submitted complete and in writing in the order shown. All requests for information in all sections of this document must be answered a concisely as possible while providing all information necessary to understand the proposed solution. Any deviation from the question or requirements that cannot be satisfied by the vendor, must be clearly identified.

Any information of a confidential or proprietary nature contained in a Vendor's response should be clearly marked 'PROPRIETARY' or 'CONFIDENTIAL' by item or at the top of each page.

Responses to this RFI will not be used to pre-qualify or otherwise restrict participation in any future procurement process (e.g. an RFP). Responses will not be formally evaluated.

CRA will not reimburse any expenditure incurred in preparing responses and participating in the presentation sessions related to this RFI.

The Vendor must provide a contact name, email address and telephone number when submitting their response.

Vendors are requested to submit responses by January 11, 2021 at 11:59PM Eastern Standard Time. Responses received after this date/time will not be reviewed.

Electronic submissions are mandatory and should be submitted as one complete package.

Vendors are requested to submit responses to this RFI using the following e-mail or facsimile number:

E-mail: val.wawrzynczak@cra-arc.gc.ca
Facsimile No: (418) 556-1811

All enquiries must be submitted via email to the attention of Val Wawrzynczak of val.wawrzynczak@cra-arc.gc.ca or by phone at (613) 614-9655

Summary of Canada Revenue Agency Requirement

The Canada Revenue Agency (CRA) has eight public-facing general enquiries call centres across Canada (see Appendix B) with agents answering over 12 million calls each year. The majority of these calls are recorded but current manual processes only allow the CRA to review a small percentage of this data. These call recordings hold valuable insights into clients' conversations, their needs and expectations, as well as their limitations with current services and/or processes. The CRA is seeking information on solutions that can leverage technology to automatically transcribe, review, categorize and analyze large volumes of call recordings and metadata in near-real time.

Providing high quality service to Canadians is strategically important to fulfilling the CRA's mandate.

The CRA is committed to modernizing its service offerings and enhancing the client experience in their service delivery channels to Canadians. As part of these efforts, the CRA is exploring ways to leverage the existing voice interaction data with analytics software to quantify, analyze and act on data findings to improve services, processes, call quality, and call centre agent training to enhance the client experience and promote first contact resolution.

Desired outcomes include, but are not limited to:

- automated transcription of a large volume (over 30K/hour, over 12M/year, average call length 9min/call) of call recordings in near-real time;

- call data converted from source language records, user interface and analytics solution is available in French and English;

- include call recording metadata, see Appendix B;

- automated comprehension/analysis of large volume of data in near-real time;

- overall management/storage/retrieval of a large volume of information along with the associated security and privacy elements meets CRA requirements;

- automated processes, where possible, quality assurance and capture of call topics / call drivers;

- incorporate other forms of communication (multi-channel), including surveys, for a full picture of the client journey;

- automated, manual and ad hoc business intelligence analytics and reports (filters), identification of emerging trends and issues and functionality to turn data into actionable insights;

- access based roles and permissions providing the ability to control, manage and monitor access to the information and reports;

- a flexible solution, compatible with multiple call centre platforms, including ongoing maintenance and timely resolution of system issues, easily accessed data that can be used and processed by other CRA applications.

The purpose of this RFI is to:

1. Determine vendor capabilities in providing a suitable, high Return On Investment (ROI), call centre analytics solution that can meet CRA's requirements.

2. Help CRA understand industry standards, best practices, and/or recommendations in terms of using call centre analytics in a public service call centre environment, including automated quality management.

3. Provide an opportunity for industry to demonstrate and discuss its software functionalities, capabilities, and constraints as it relates to large volumes of data.

4. Solicit feedback on integrating the solution with existing CRA platforms and systems.

5. Solicit feedback on the cost, schedule, level of effort, hardware requirements and technical architecture.

Constraints

Official languages – Must be adaptable to English and French (interface and analytics functionalities).
Accessibility – Must be accessible to visually impaired employees
User access – Must have user access provisioning capabilities
Retention – Must have flexible file retention rules

Appendix A - Questions

The following questions are representative of the type of information the CRA is seeking as it considers how to structure any RFP that might follow this RFI process.

Vendors must note that this list of questions is not exhaustive, and vendors are invited to provide any additional information that might prove useful and/or beneficial to the CRA in preparing any subsequent RFP.

Vendors that provide written feedback may be invited to a one-on-one consultation session with CRA representatives. This session would allow vendors to provide additional feedback pertaining to this RFI as well as to explain comments made in their written submission.

A.1 – Questions –	
A.1	What is your company's overall methodology and approach to call centre analytics with a large volume of data? CRA example: over 30k calls/hour, over 12M calls/year, with an average call duration time of 9 minutes per call. List and describe all the various features / applications that comprise your solution including all the options and their prices including on premise and hosted.
A.2	Does your company have experience providing transcription and data mining solutions with a large volume of data? Can you describe the speed and frequency (near-real time, hourly, daily, weekly, annually etc.) of your solution as it pertains to a large volume of data? Can the data be accessed (Protected B), used and processed by other CRA applications?
A.3	Please describe your solutions use of Artificial Intelligence (AI), Conversational Intelligence, Machine Learning.
A.4	Can your speech analytics platform process different formats of recording produced by a variety of contact centre platforms? Are there limitations to processing recording that were not generated by your platform?
A.5	How important is high quality recording for the solution to operate successfully?
A.6	Can other communication channels, such as surveys be ingested as a contact type for correlation in the system?
A.7	Describe how the system provides automated root cause analysis and identifies key issues impacting the contact centre?
A.8	What is your approach to solving common business challenges such as first call resolution?
A.9	Describe your methodology of categorization including your top 5 best practices. Can categories/sub-categories be created by the user and automatically by the solution?
A.10	Does the solution allow for customized call centre metadata to be included with each record?
A.11	How does the system detect and analyze emotions and sentiment?
A.12	Describe your search options and filters. Can a large volume of data be searched for key words, phrases etc. manually and automatically?
A.13	Describe your Automated QA capabilities?
A.14	Can your solution convert records in its source language including: French and English?

A.15	Describe how your call analytics solution provides documentation, user interfaces and analytics functionality in English and French. If you do not have a French interface today, would you be able to have one in the future? How long would it take to develop?
A.16	Can you describe the access based roles and permissions which provide the ability to control, manage and monitor access to the information and reports?
A.17	What analytical tools are provided, and are they automated and manual? How would the solution amalgamate the results for English and French data?
A.18	Can you describe the overall management/storage/retrieval of the large volume of data along with the associated security best practices for protected information?
A.19	Is the solution flexible, compatible with multiple call centre platforms, offering ongoing maintenance and timely resolution of system issues?
A.20	Please describe the steps and estimated timelines that are usually followed for a large implementation.
A.21	Are there any other considerations to consider with this RFI that you believe CRA should understand to ensure a successful implementation with first contact resolution and automating QA being the main objectives?