

CRMXchange Request for Information

Workforce Management

Please provide the following information regarding the features and capabilities of your solution. Your responses may be entered directly into this document.

Many of the questions have been structured as 'checkboxes' in order to minimize the effort of formulating your responses. To 'check' and entry, replace the "_" with an "X". In most cases an 'Other' response option is given to allow for any extended information you may wish to include.

Your responses will be published in a Vendor Comparison section on our website. Do not include any information which you deem proprietary or confidential, as access to your responses will be open to all members of the CRMXchange community.

Company Information	
Company Name	InVision Software, Inc.
Company Address	2135 CityGate Lane Suite 300 Naperville, IL 60563
Email Contact	Bud.Nugent@InVisionwfm.com
Telephone Contact	Bud Nugent, Business Development Office: 617-973-6439 Mobile: 857-284-9333
Website URL	www.iwfm.com
Geography Supported	X - North America X- Central America (including the Caribbean) X - South America X - Eastern Europe X - Africa _ - Asia

Product Information	
Product Name	iwfm.com
Current Version	2011.1
Release Date of Current Version	March 2011
Installed Base (total number of users)	n.a.
What is the smallest number of users supported on a single system?	X - Less than 25 (>10) _ - 25 to 50

	<input type="checkbox"/> - 50 to 100 <input type="checkbox"/> - More than 100
What is the largest number of users supported on a single system?	<input type="checkbox"/> - Less than 100 <input type="checkbox"/> - 100 to 1,000 <input type="checkbox"/> - 1,000 to 5,000 <input checked="" type="checkbox"/> - More than 5,000
What languages are supported?	<input type="checkbox"/> - Arabic <input type="checkbox"/> - Chinese <input checked="" type="checkbox"/> - English <input checked="" type="checkbox"/> - French <input checked="" type="checkbox"/> - German <input type="checkbox"/> - Japanese <input checked="" type="checkbox"/> - Portuguese <input checked="" type="checkbox"/> - Russian <input checked="" type="checkbox"/> - Spanish <input type="checkbox"/> - Other: Italian, Dutch, Norwegian, Swedish, Polish. The application is prepared to support Unicode characters.

Architecture	
What are your minimum server hardware requirements?	Not Applicable – The system is SaaS.
What server operating systems are supported?	<input type="checkbox"/> - Windows <input type="checkbox"/> - UNIX <input type="checkbox"/> - Linux <input checked="" type="checkbox"/> - Other <u>Not Applicable – The system is Saas.</u>
What server virtualization environments are supported?	<input type="checkbox"/> - VMware <input type="checkbox"/> - Citrix <input type="checkbox"/> - Oracle (Sun) <input type="checkbox"/> - Microsoft <input type="checkbox"/> - Red Hat <input checked="" type="checkbox"/> - Other <u>Not Applicable – The system is Saas.</u>
What are your minimum client hardware requirements?	Not Applicable – The system is SaaS.
What client operating systems are supported?	<input checked="" type="checkbox"/> - Windows XP <input checked="" type="checkbox"/> - Windows 7 <input checked="" type="checkbox"/> - Windows Vista <input type="checkbox"/> - Mac OS X <input type="checkbox"/> - Linux <input type="checkbox"/> - Other _____
What client virtualization environments are supported?	<input type="checkbox"/> - VMware <input type="checkbox"/> - Citrix

	<input type="checkbox"/> - Microsoft <input checked="" type="checkbox"/> - Other <u>Not Applicable – The system is SaaS.</u>
Is your client 100% web-based?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
What browser extensions are required?	<input type="checkbox"/> - .NET <input type="checkbox"/> - J2EE <input checked="" type="checkbox"/> - Other: ActiveX (automatically provided via CAB-files)
What web browsers are supported for client access?	<input checked="" type="checkbox"/> - Internet Explorer <input type="checkbox"/> - Firefox <input type="checkbox"/> - Chrome <input type="checkbox"/> - Safari <input checked="" type="checkbox"/> - Other: <u>Other browser options will be available soon.</u>
What databases are supported?	<input type="checkbox"/> - Oracle <input type="checkbox"/> - SQL Server (Microsoft) <input type="checkbox"/> - DB2 (IBM) <input checked="" type="checkbox"/> - Other: Not Applicable – The system is SaaS.
What data import capabilities are supported?	Interface server
What data export capabilities are supported?	These formats are choices: HTML, PDF, XLS, CSV, XML
Does your solution offer Active Directory integration?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
What mobile devices are supported?	<input type="checkbox"/> - iPhone / iPad <input type="checkbox"/> - Blackberry <input type="checkbox"/> - Android <input type="checkbox"/> - Other _____
Is your WFM solution part of integrated suite?	<input type="checkbox"/> - Yes <input checked="" type="checkbox"/> - No
What other solutions are available in your suite?	<input type="checkbox"/> - Quality Management / Monitoring <input type="checkbox"/> - Interaction Recording <input type="checkbox"/> - Customer Surveys <input type="checkbox"/> - Performance Management <input type="checkbox"/> - Coaching / eLearning <input type="checkbox"/> - Interaction Analytics <input type="checkbox"/> - Desktop Analytics <input type="checkbox"/> - Other _____
Do you offer premise-based deployment of your solution?	<input type="checkbox"/> - Yes <input checked="" type="checkbox"/> - No
Do you offer hosted / SaaS deployment of your solution?	<input checked="" type="checkbox"/> - Yes – The system is SaaS. <input type="checkbox"/> - No
What high-availability options are available for your solution?	<input type="checkbox"/> - Server Clustering <input type="checkbox"/> - Data Mirroring

	<input type="checkbox"/> - Cold Standby <input type="checkbox"/> - Hot Standby <input checked="" type="checkbox"/> - Other: SaaS, 24/7, 95% minimum uptime
Does your solution support multi-site, virtual contact center operations?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
Does your solution support centralized administration in a multi-site environment?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
Are multiple ACD or other data connections supported on a single system?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No

Security	
Does your solution control access by individual user profiles?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
Can user access be managed by group or role?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
What user password policy features are supported?	<input checked="" type="checkbox"/> - Change Frequency <input checked="" type="checkbox"/> - Prohibited Passwords <input checked="" type="checkbox"/> - Password Complexity <input checked="" type="checkbox"/> - Password History <input type="checkbox"/> - Other _____
Can users reset their passwords using self-service options?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
Does your solution maintain an audit trail?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
How is the audit trail stored	<input type="checkbox"/> - Text file <input type="checkbox"/> - Relational Database <input checked="" type="checkbox"/> - Other: Internal

Forecasting	
What forecast intervals does your solution support?	<input type="checkbox"/> - 5 min <input type="checkbox"/> - 10 min <input checked="" type="checkbox"/> - 15 min <input checked="" type="checkbox"/> - 30 min <input checked="" type="checkbox"/> - 60 min <input type="checkbox"/> - Other _____
What service goals does your solution	<input checked="" type="checkbox"/> - AHT

support?	X - Service Level X - ASA X - Occupancy X - Abandon Rate _ - Other _____
Can service goals be assigned for individual contact types or queues?	X - Yes _ - No
What multimedia forecasting capabilities does your solution support?	X - Universal Queue X - Block Scheduling X - Other Patented multi-activity scheduling
What forecasting methodologies does your solution support?	X - Erlang or similar mathematical approach _ - Simulation or other discrete event approach X - Workload or other activity based approach X - Other Patented multi-activity scheduling
Does your solution support Multiskill forecasting?	X - Yes _ - No
What is the maximum number of weeks that forecasts can be created?	_ - One _ - Two _ - Three X - Four or More
Does your solution support outbound forecasting?	X - Yes _ - No
Does your solution support back office forecasting?	X - Yes _ - No
Does your solution account for holidays, seasonality and special days?	X - Yes _ - No
Does your solution automatically filter historical data?	X - Yes _ - No
Does your solution allow manual manipulation and editing of forecasts?	X - Yes _ - No
Does your solution provide user control over historical data weighting?	X - Yes _ - No
Does your solution support multiple time zones?	X - Yes _ - No
What is the maximum amount of historical data stored?	_ - One Year or Less _ - One to Three Years _ - Three to Five Years X - More than Five Years _ - Other _____
How is historical data stored?	X - Interval-by-Interval X - Summary _ - Other _____
Explain the 'what-if' analysis features	iwfm.com enables detailed forecasts and schedules to be

available for forecasting.	generated for up to several years ahead, in a single step. This is only possible due to iwfm.com's proprietary, unique, patented and scalable optimization engine. Schedules can be created to run what-if-scenarios for the existing workforce, or the optimization can be used to determine 'best-fit' shift patterns for any period to identify the ideal shift patterns to hire for. Scenarios can include forecasts and schedules and can be backed up, restored and compared to each other.
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Scheduling	
Can schedule changes be 'undone' once they are saved?	X - Yes _ - No
What scheduling intervals does your solution support?	X - 15 min X - 30 min X - 60 min _ - Other _____
Does your solution automatically schedule events and meetings?	X - Yes _ - No
Can events and meetings be automatically added after schedule generation?	X - Yes _ - No
What is the maximum number of weeks your solution can schedule at one time?	_ - One Week _ - Two to Four Weeks _ - One Month X - More than One Month _ - Other _____
How many types of schedules does your solution support?	Unlimited
Does your solution support spit shift schedules?	X - Yes _ - No
How are agents assigned to schedules?	X - Manually X - Automated X - Schedule Bidding X - Other: Patented multi-activity scheduling
What agent preferences are taken into account to automatically assigning schedules?	X - Start Time X - Days Off X - Weekends X - Hours Worked X - Availability _ - Other _____
Can individual preferences be prioritized by agents?	X - Yes _ - No

How is bidding priority assigned?	X – Seniority X - Performance _ - Other _____
Are schedules automatically assigned after the bidding process completes?	X - Yes _ - No
What scheduling options are supported for breaks and lunches?	X - Start Time X - Duration X - Time Between _ - Other _____
What is the maximum number of schedule activities supported by your solution?	Unlimited
Can schedules be changed after they are assigned?	X- Yes _ - No
Does your solution handle schedules that cross midnight?	X - Yes _ - No
What additional scheduling parameters does your solution support?	X - Weekend Fairness X - Shift Rotations X - Position Limited X - Team / Ride Share X - Hours Worked X_ - Consecutive Days X - Skill Proficiency X - Union Work Rules _ - Other _____

Adherence	
Does your solution track and report historical agent adherence?	X - Yes _ - No
What types of historical adherence calculations are performed?	Adherence information is both real-time and historical. AdherenceMonitor delivers real-time adherence information. The adherence and conformance reports deliver printed (PDF/HTML) historical information, for the selected date range. All historical adherence information is available per day and per part of the day (interval).
How many months of historical adherence data are maintained?	The date range is not limited to the preceding days, but it can be as far in the past as the day of go-live.
Does your solution track and report real-time schedule adherence?	X - Yes _ - No
Does your solution track and report real-time activity (length of time)	X - Yes _ - No

adherence?	
What types of automated adherence alerts are offered by your solution?	<input type="checkbox"/> - Email <input type="checkbox"/> - Text <input type="checkbox"/> - Smart Phone Application <input checked="" type="checkbox"/> - Other: <u>Online Realtime AdherenceMonitor</u>

Vacations & Holidays	
Does your solution support agent vacation and holiday requests?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
Does your solution track vacation accrual and carry-over?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
How does your solution handle agent requests for days that are not available?	<input checked="" type="checkbox"/> - Request Denied <input type="checkbox"/> - Wait Listing <input checked="" type="checkbox"/> - Other: Planning windows must be open for vacation requests to be processed. Employees will not be able to request vacation unless it is open and the system will reject the request. Alternatively, if the planning window is open and all available vacation opportunities are exhausted (the allotment is already used), the employee will get a denied response and no approval
Does your solution support vacation bidding?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
How is bidding priority assigned?	<input checked="" type="checkbox"/> - Seniority <input type="checkbox"/> - Performance <input checked="" type="checkbox"/> - Other: Preferences, Availability, Bonus Points
Does your solution support multiple rounds of bidding?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No

Intra-day / Change Management	
Does your solution automatically update intraday reports when new data is received?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
Does your solution automatically reforecast based on intraday information?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
Are schedule changes applied to the intraday data?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No

What intraday reporting levels are supported?	<input checked="" type="checkbox"/> - Company <input checked="" type="checkbox"/> - Site <input checked="" type="checkbox"/> - Business Unit <input checked="" type="checkbox"/> - Queue <input checked="" type="checkbox"/> - Contact Type <input checked="" type="checkbox"/> - Management Group <input checked="" type="checkbox"/> - Supervisory Group <input checked="" type="checkbox"/> - Agent <input type="checkbox"/> - Other _____
Does your system provide 'drill-down' intraday reporting capabilities?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
What intraday 'what-if' capabilities are provided by your solutions?	<input checked="" type="checkbox"/> - Queue reassignment <input checked="" type="checkbox"/> - Off-Phone activity reassignment <input checked="" type="checkbox"/> - Voluntary Time Off <input checked="" type="checkbox"/> - Voluntary Overtime <input type="checkbox"/> - Other _____

Self-Service	
What self-service capabilities are provided by your system?	<input checked="" type="checkbox"/> - Schedule Viewing <input checked="" type="checkbox"/> - Schedule Bidding <input checked="" type="checkbox"/> - Schedule Swaps / Trades <input checked="" type="checkbox"/> - Schedule Change Notifications (Supported soon) <input type="checkbox"/> - Schedule Activity Notifications <input type="checkbox"/> - Schedule Change Requests <input checked="" type="checkbox"/> - Time-Off Requests <input checked="" type="checkbox"/> - Vacation Requests <input checked="" type="checkbox"/> - Vacation Bidding <input checked="" type="checkbox"/> - Scheduling Preferences <input type="checkbox"/> - Performance Metrics <input type="checkbox"/> - Other _____
What access methods does your solution support for self-service?	<input checked="" type="checkbox"/> - Web Browser <input type="checkbox"/> - Kiosk <input type="checkbox"/> - Desktop Client Application <input type="checkbox"/> - Mobile Device / Smart Phone <input type="checkbox"/> - Other _____
Does your solution provide automated workflows?	<input checked="" type="checkbox"/> - Yes <input type="checkbox"/> - No
What automated workflows are supported?	<input checked="" type="checkbox"/> - Vacation / Time-Off Approval <input type="checkbox"/> - Schedule Change Request Approval <input checked="" type="checkbox"/> - Schedule Bidding <input checked="" type="checkbox"/> - Vacation Bidding <input type="checkbox"/> - Other _____

Resource Planning / Budgeting	
Describe the 'what-if' capabilities for resource planning and budgeting offered by your solution.	"What-if" scenarios can be created for forecasting by using different versions and changing the base volumes to be forecasted.
Does your solution provide long-term forecasting and scheduling?	X - Yes _ - No
What is the maximum number of months that be forecasted?	Unlimited
Does your system support automated growth and other statistical trending in forecasts?	X - Yes _ - No
Does your solution calculate long-term staffing requirements?	X - Yes _ - No
Does your solution generate staffing plans?	X - Yes - No
Does your solution automatically optimize schedule types to minimize costs?	X - Yes - No
Does your solution calculate long-term capacity (infrastructure, facility, etc.) requirements?	_ - Yes X - No
Does your solution generate long-term budget plans?	_ - Yes X - No

Services	
What is the charge for updates (major, minor, etc.)?	SaaS, system is always up-to-date.
What on-site training options do you offer?	WFM business practices, consulting services, and end-user training
Are online (CBT) training options offered?	Yes
Explain your available maintenance plans (cost, coverage, response, etc.).	Not Applicable – The system is SaaS.
What is a 'typical' implementation time frame?	1 hour
What training is included with purchase?	Full training
What is your warranty?	Not Applicable – The system is SaaS.
Does your company utilize third-party	No.

support services? Under what conditions?	
What options do you offer for web and email support?	SaaS, support included.

Pricing	
Please provide average per agent pricing for a 200 agent, single site, single ACD configuration (low and high range).	9 USD per agent per month
Explain what is included in the above price.	Complete SaaS offering
Explain what is not included in the above price.	Optional coaching package available, WFM consulting.
Please provide average per agent pricing for a 400 agent, 2 site (200 agents, 1 ACD per site) configuration (low and high range).	9 USD per agent per month
Explain what is included in the above price.	Complete SaaS offering.
Explain what is not included in the above price.	Optional coaching package available, WFM consulting.