

Camelot Illinois

Request for Proposal for the Provision of Managed Call Center Services.

February 01, 2018

1 Introduction

Camelot Illinois is a leading technology and services provider to lotteries around the world.

The **Illinois State Lottery** www.illinoislottery.com awarded the Private Management Agreement (PMA) to Camelot Illinois on Sept 22, 2017 following a bid submission. Following the Notice of Award, the PMA was executed on Oct 13, 2017.

Camelot Illinois, as part of an overall business strategy to grow revenue for the Illinois Lottery, has plans as part of a Technology Transformation program, to roll out a new, robust and engaging iLottery website that will help grow the number of registered players over the term of the private manager agreement, while still growing the retail channel in parallel.

The Technology Transformation program which will be managed by Camelot Global on behalf of Camelot Illinois aims by Dec 2018 to replace or upgrade the existing draw games central system, retail hardware, communications network and the iLottery channel (website and mobile apps).

To support the transition and growth plans Camelot Illinois requires a Contact Center to serve Lottery Players, Potential Players and the Public. The Call Center agents will be required to support players who use the website and be able to resolve both technical and operational issues.

Lottery Players include:

- those who purchase lottery draw tickets and instant tickets (scratch cards) at retailers
- those who purchase tickets online (referred to as iLottery) via the website or mobile applications

Potential Players include:

- those who are trying to register for iLottery or want more information about the games, funding for good causes etc.

Members of the public include:

- those who may have general Questions about the Lottery

The contact center is not currently expected to handle questions from Retailers or Press/Public Relations inquiries.

This request assumes that a managed service will be provided by the Provider, including staff, premises, telephony, software to support inbound contacts, CRM/contact logging software, reporting, compliance recording and infrastructure to support the service.

The service provider will be expected to engage with Camelot Global project teams and take an active part in creating the procedures that support users of the service. Camelot Illinois will be responsible for the ongoing service and all issue escalation and service enhancement will be managed by that entity.

2 Instructions

This document invites your organization to submit a proposal for the supply of call center services, to Camelot Illinois.

Requirements are set out in Section 7.

2.1 Timetable

Your proposal should be submitted by March 09, 2018 5pm CST and for the attention of:

Antoinette Davis

Email: antoinette.davis@camelotillinois.com

The headline RFP milestones are as follows:

Issue RFP	Feb 01, 2018
Last Date for Vendor Questions	Feb 15, 2018 by 5pm CST
Question responses	by Feb 23, 2018
Intention to Bid Confirmation	Feb 26, 2018
RFP submission date	Mar 09, 2018 by 5pm CST
Presentations (TBD)	Mar 19 - Mar 23, 2018
<i>Estimated Date of Award</i>	by Apr 06, 2018
<i>(subject to contract)</i>	

Camelot Illinois reserves the right to make any necessary amendments to the above timetable. Any such changes will be posted on the Illinois Lottery website and respondents will be notified in writing of any changes to these dates. Responses submitted late will not be considered.

2.2 Contacts

Please communicate any questions via email to Matthew Wenzel whose email address is matthew.wenzel@camelotillinois.com. Questions regarding the RFP must be emailed before February 16, 2018 5pm CST. A consolidated response to any questions will be posted on the Illinois Lottery website under the Business/Procurement Opportunities tab ¹ and will be made available to all respondents

¹ http://www.illinoislottery.com/en-us/Business_Procurement_Opportunities.html

without identifying the supplier that asked the question. Camelot Illinois reserves the right to decline to answer specific questions.

2.3 Intention to Respond

If our business is of interest to you, and you intend to submit a proposal, respondents are required to submit their intention to respond via email to Antoinette Davis whose email address is antoinette.davis@camelotillinois.com by February 26 2018 5pm CST.

2.3 Response Format

Please provide the following information on the cover page of your response document and ensure that your organization's name appears on each subsequent page of the document:

- Supplier Name
- Supplier Address
- Contact Name
- Contact Job Title
- E-mail Address
- Telephone Number

Ensure that your response follows our format (numbering your answers in the format of this document). Failure to do so may result in your answer being misinterpreted or missed. Please answer all questions fully. Responses should be delivered in electronic format via email to antoinette.davis@camelotillinois.com

The proposal should explain how you could support Camelot Illinois in the achievement of its objectives.

Where possible, the proposal should also include:

- Innovative ideas on meeting Camelot Illinois requirements
- Why Camelot Illinois should choose you as a supplier, and
- How your service offering differs from the competition

2.4 Supplier Meeting / Site Visit

Those suppliers selected to go forward may be given the opportunity to demonstrate their ability to meet Camelot Illinois requirements through supplier meetings and, if appropriate, site visits to their premises. The supplier must at such meetings/visit be able to demonstrate the end to end processes and systems

employed to provide an efficient service. All meetings will be limited to 2 hours or less and apportioning of time should take this into account.

Arrangements will be made following receipt of the RFP Response.

3 Conditions of the RFP

3.1 General Considerations

The issuing of this RFP does not constitute a legal offer capable of acceptance.

Camelot Illinois reserves the right to reject any or all of the proposals submitted, or to withdraw the RFP at any time. Camelot Illinois also reserves the right to accept a proposal from suppliers in part only.

Camelot Illinois will not be liable for any costs incurred by any company in connection with the preparation of a response to this RFP, or for any costs incurred for attendance at meetings, presentations, clarifications or demonstrations.

The numbering of the RFP is an important aid in the evaluation process. Please utilize it within your response as this may affect our evaluation of your response.

Prospective suppliers shall take no advantage of any apparent error or omission in the RFP documents. In the event that any errors or omissions are discovered, a supplier shall notify Camelot Illinois immediately.

Please provide complete and accurate information against the specification contained within this RFP. If you are unable to meet any requirements, then this should be clearly noted in the appropriate response section(s). Any assumptions within your response to the RFP should be clearly stated.

Any commitment made in response to this RFP will be binding on the Supplier. A commitment includes any guarantee or representation made in the RFP response, accompanying documentation or subsequent negotiation.

3.2 Confidentiality

Subject to Appendix A - Private Manager Agreement Incorporated Terms, of this RFP, any information disclosed in, or in connection with the RFP becomes the property of Camelot Illinois subject to supplier's redaction of confidential, proprietary and other sensitive material in accordance with the PMA and State Policies and Rules. Such information will be available to the public in accordance with State Policies and Rules. However, the failure to designate any materials as "proprietary and confidential" at the time of

delivery of such information to Camelot Illinois does not prohibit the supplier from subsequently designating any information as “proprietary and confidential. However, this designation does not necessarily exempt such information from disclosure under the Illinois’ Freedom of Information Act.”

3.3 Employment

From the time this RFP is issued until either (i) six (6) months after the award of a contract or (ii) the rejection of all proposals received by Camelot Illinois, suppliers are prohibited from officially or unofficially making any employment offer or proposing any business arrangement with Camelot Illinois’ employees.

3.4 Compliance

Failure to comply with any specific instruction(s) detailed in this RFP may, at Camelot Illinois’ discretion, exclude the supplier from further consideration in the process.

3.5 Selection of supplier

Any response that fails to meet the requirements set out in this RFP will be disqualified.

The table below defines the evaluation criteria and the relative importance of each criteria that will be used to evaluate the responses received.

Response Elements	Relates to requirements	Maximum # of Points Possible
Background and Experience	C-1 to C-9	20
Completeness of the Service	R-1 to R-37	30
Account & Relationship Management	R-41 to R-53	20
Staff, Training, Monitoring	R-61 to R-73	20
Systems, Security	R-81 to R-88	20
Adaptability, Integration	R-91 to R-98	10
Overall price, pricing model and value for money	P-7 to P-12	30
	Total	150

Camelot Illinois does not represent that these are the sole criteria and reserves the right to adjust selection criteria until Feb 23, 2018. Any such changes will be posted on the Illinois Lottery website, no later than Feb 23, 2018 to permit any necessary refinement of their proposal prior to submission.

Camelot Illinois' decision on the winning bidder will be determined by the highest overall score achieved based on the above criteria, scored following submission and if appropriate updated following any presentations. Camelot Illinois' decision will be final.

3.6 Terms and Conditions

Respondents should note that any contract/purchase order award will also be subject to Camelot Illinois' terms and conditions.

Camelot Illinois operates within a regulated environment and it is a requirement of Camelot Illinois' regulator, that suppliers will be vetted or approved by the regulator in advance. Accordingly, the prospective awardee must complete State disclosure and certification documents. For further information about this requirement, please contact, Norma Sutton at norma.sutton@camelotillinois.com; 312-877-0477.

Camelot Illinois and the State of Illinois Department of the Lottery now have in effect a signed Private Manager Agreement (the 'PMA') in which Camelot Illinois is the Private Manager of the Illinois State Lottery. The PMA requires Camelot Illinois to pass through various non-negotiable provisions to all suppliers. We will achieve this by including a separate schedule titled 'Private Manager Agreement Incorporated Terms' into the successful respondent's contract. This will take priority over any conflicting term in the rest of the contract. Refer to Appendix A for a final version of the Private Manager Agreement Incorporated Terms.

From the time the RFP is issued until the end of the contract term, supplier represents and warrants that (i) it shall not be debarred or prohibited from doing business within the State of Illinois for any reason; nor, (ii) likely to have a material and/or adverse effect on the interests of the Lottery.

Camelot Illinois is looking to establish a contract for an initial term of five years with an option to renew based on supplier's performance and Camelot Illinois' evolving requirements and strategy, this will be subject to negotiations during the contracting stage.

3.7 Validity of Proposal

Proposals should be left open for acceptance or non-acceptance for a period of 90 days from the date the proposal is submitted.

4 Estimated Timings

4.1 Start of Managed Call Center Services

A phased approach will be taken to Camelot Illinois' responsibilities as Private Manager and this RFP relates to provision of managed call center services timed to support the launch of an updated website for iLottery (online play via www.illinoislottery.com and mobile applications) and changes to the Retail environment. This is currently estimated to commence around December 2018.

The successful bidder for managed call center services will be expected to remain engaged with Camelot Illinois during the development period and ensure that the service goes live with procedures and processes agreed and operational.

5 Response Approach and Format

Respondents are requested to provide:

- A completed version of the Company Information section, with brief responses;
- A completed version of the Requirements section with full responses against each requirement (where applicable);
- A completed pricing schedule with any variation included at the end.

Where necessary, respondents may supplement responses with additional material, but should ensure that material is focused on the information requested and referenced to the section for which they apply. (Camelot Illinois may be unable to search through generic material to attempt to find relevant information).

If the respondent needs to exclude some requirements from their full-service proposal, this should be accompanied by a clear statement of which items are excluded and why.

If the respondent feels that additional services, not mentioned in the requirements, should be provided in order to supply a full-service solution, please provide a clear statement of which additional items are included and why.

6 Company Information

Please provide the following information about your company:

#	Information	Response
C-1	Company Name	Answer in Full
C-2	Company Background, including details of Ownership	Answer in Full
C-3	Relevant Case Studies	Answer in Full
C-4	Current number of employees	Answer in Full
C-5	Staff Retention. Annual turnover rate for each of last 3 years	Answer in Full
C-6	Current number of part time employees	Answer in Full
C-7	Please summarize your experience relevant to the requirements	Answer in Full
C-8	Strengths and points of difference from your competitors	Answer in Full
C-9	<p>Please describe the resources which will be allocated to support Camelot Illinois, and your overall organizational structure.</p> <p>(If your organization is selected to make a presentation the people who would have day to day involvement should make up a significant part of the presentation team).</p>	Answer in Full

7 Requirements

Please provide responses on the following general requirements:

Respondents should either acknowledge acceptance of a requirement, complete a response in full or reject it. If a requirement is rejected then any mitigating circumstances or alternative approach may be offered, however these may not be accepted as compliant. Respondents may provide additional information to questions where the response is requested as being 'Acknowledge Only', but this will not contribute to the overall scoring of the response.

#	Requirement	Response
R-1	The Contact Center must be located in the USA	Acknowledge Only
R-2	The workflow is expected to be inbound contacts only although outbound communication may be required to update or resolve contacts	Acknowledge Only
R-3	Inbound Channels: The following channels should be supported for player/public contacts <ul style="list-style-type: none"> - Telephone (inc automated IVR response) - WebChat - Email - Contact Us Web Form (generates email in template format) - Post (including potentially checking identification details) 	Acknowledge Only
R-4	It is not currently expected that the Contact Center will conduct outbound campaigns (no mass calling, or cold calling is anticipated, and Camelot Illinois marketing will manage email campaigns themselves) although these may affect inbound call volume	Acknowledge Only
R-5	It is not currently expected that Contact Center will be required to monitor Social Media channels (Twitter, Facebook, Instagram etc.). Camelot Illinois public relations staff will manage these channels although these may affect inbound call volume	Acknowledge Only
R-6	Live Operating Hours (live agent available): 24 x 7 x 365 (<i>initial assumption but may be revised</i>) with resourcing appropriate for volumes	Acknowledge Only
R-7	Languages to be supported (spoken and written): English (Must have), Spanish (may be required)	Acknowledge Only
R-8	The Service Provider must have Business Continuity and Disaster Recovery processes and solutions in place to enable them to meet the contractual obligations	Acknowledge Only
R-9	The Contact Center will represent Camelot Illinois in offering excellent service (not just administration support) to players and potential players.	Acknowledge Only
R-10	Camelot Illinois will provide a toll-free phone contact number and email address for player contacts	Acknowledge Only

R-11	All data recorded will remain the property of Camelot Illinois	Acknowledge Only
R-12	The Service Provider will use their own CRM solution to make a record of every interaction with a Player/member of the public.	Acknowledge Only
R-13	Camelot Illinois, State officials and other authorized resources will require on-line access to the CRM solution.	Acknowledge Only
R-14	CRM records must be coded to enable easy reporting (e.g. channel, query reason) - according to Camelot Illinois requirements - which may change over time.	Acknowledge Only
R-15	Registered iLottery Players will need to pass caller authentication checks before the Agent can discuss any personal account details with them.	Acknowledge Only
R-16	Each CRM record for a registered iLottery player must include the Player Id and correct name (matching the Camelot Illinois player administration portal)	Acknowledge Only
R-17	Camelot Illinois requires extracts of data from CRM solutions for reporting	Acknowledge Only
R-18	The Contact Center will take calls/queries from registered iLottery Players, people trying to register for iLottery, Players who have purchased tickets at Retailers and members of the Public.	Acknowledge Only
R-19	Camelot Illinois and the Contact Center Service Provider will agree policies and procedures for query handling and escalation procedures (including escalation/transfer to Camelot Illinois and the State). These will be refined over time.	Acknowledge Only
R-20	Contact Center agents will View Player and Account information to solve Player queries, (Using Camelot Illinois' iLottery Administration Portal). This may include player contact details and information about games played, funding and prize queries.	Acknowledge Only
R-21	Contact Center agents will always be expected to guide registered iLottery players to update their own information wherever possible but may have access to make updates for players when needed. Policies regarding Agent permissions will be agreed between Camelot Illinois and the Contact Center and may change over time.	Acknowledge Only
R-22	It must be possible for authorized persons to monitor live calls real-time (including Camelot Illinois and State Lottery Officials, by arrangement).	Acknowledge Only
R-23	The Service Provider will conduct quality checks (including real-time monitoring when appropriate) to assess and improve agent performance and training needs.	Acknowledge Only
R-24	Camelot Illinois and Lottery Officials will require regular (weekly, monthly, quarterly and annual) reports on inquiry data, trends and quality against targets (Details and KPIs to be agreed).	Acknowledge Only
R-25	Up-to-date information (ideally dashboards and the ability to generate ad-hoc reports) should be accessible online to Camelot Illinois and Lottery Officials.	Acknowledge Only

R-26	100% of Voice calls, WebChat and Email correspondence must be recorded/saved	Acknowledge Only
R-27	An electronic copy of 100% of postal correspondence (if in scope) should be saved.	Acknowledge Only
R-28	Voice/WebChat/Email records should be retrievable with the relevant CRM contact record	Acknowledge Only
R-29	Agent screen activity for contacts should be recorded and saved.	Acknowledge Only
R-30	Screen activity records should be retrievable with the relevant CRM contact record and voice recording (if applicable)	Acknowledge Only
R-31	The Service Provider will conduct quality checks on recorded materials to assess and improve agent performance and training needs	Acknowledge Only
R-32	Stored records must be accessible on-line for a period and managed in accordance with relevant data protection legislation.	Acknowledge Only
R-33	The state may require records to be retained for a specific period then deleted.	Acknowledge Only
R-34	Older records must be accessible from archives (retention period and retrieval SLA's to be agreed)	Acknowledge Only
R-35	Camelot Illinois will remain the owner of all contact and CRM records (and these must be transferred to Camelot Illinois at agreed intervals).	Acknowledge Only
R-36	Minimum security standards will be agreed and must be maintained	Acknowledge Only
R-37	Supplier must have a robust approach to segregation of data, call handling and all aspects of the operation to ensure no confusion between clients.	Acknowledge Only

#	Requirement	Response
R-41	Explain new account on-boarding and implementation	Answer in Full
R-42	Describe your approach to program and account management	Answer in Full
R-43	Describe your quality assurance methodology	Answer in Full
R-44	Please provide a profile of the account manager assigned to our program and our access to your company management	Answer in Full
R-45	Indicate the number of accounts your program manager will be responsible for	Answer in Full

R-46	Describe how you handle change requests and the average time a typical request takes to implement	Answer in Full
R-47	Describe your issue/problem resolution procedure	Answer in Full
R-48	Are calls recorded and can clients access those recordings	Answer in Full
R-49	Is remote monitoring available	Answer in Full
R-50	Do you have customizable reporting capabilities	Answer in Full
R-51	Please provide sample of a standard set of reports	Answer in Full
R-52	How often do you issue reports, are you able to generate ad-hoc reports	Answer in Full
R-53	Explain how you determine and maintain policies and procedures	Answer in Full
#	Requirement	Response
R-61	Explain how you do staff resource forecasting, including support technology	Answer in Full
R-62	What will be your approach to training for our program	Answer in Full
R-63	How quickly can you scale up representatives on our program	Answer in Full
R-64	How do you respond to unexpected changes in volume, how do you flex resources at short notice	Answer in Full
R-65	What incentives do you provide your representatives	Answer in Full
R-66	Do you have both shared-team and dedicated-team programs	Answer in Full
R-67	What is your employee turnover rate and how do you manage this	Answer in Full
R-68	How do you assess and monitor training	Answer in Full
R-69	Would we be allowed to participate in hiring new members of our account team, including supervisors	Answer in Full
R-70	Would we be allowed to visit your facilities for live monitoring of customer service representatives	Answer in Full
R-71	How often do you conduct staff calibration meetings	Answer in Full
R-72	How do you handle training updates including important or emergency update	Answer in Full
R-73	What is the ratio of representatives to supervisors	Answer in Full
#	Requirement	Response
R-81	What is your approach to IT, what determines technology choices	Answer in Full

R-82	Please explain how infrastructure and services are delivered including details of the applications used	Answer in Full
R-83	Describe your business continuity and disaster recovery plans	Answer in Full
R-84	How do you handle downtime and how much downtime did you have over the previous 2 years	Answer in Full
R-85	Describe your IT staff operations, including size, hours of availability	Answer in Full
R-86	Explain your back-up and storage capabilities	Answer in Full
R-87	Describe your systems audit procedures	Answer in Full
R-88	Describe your approach to Security and provide details of any accreditations	Answer in Full
R-89	Provide system availability figures for the last 3 years	Answer in Full
#	Requirement	Response
R-91	How would trends within the Contact Center be used to provide feedback to Camelot Illinois about website features and processes that cause difficulties for players to assist Camelot Illinois with future improvement plans.	Answer in Full
R-92	Describe how would you manage the protection of sensitive information that may be disclosed during an inquiry/call.	Answer in Full
R-93	Camelot Illinois is looking to improve player relationships and provide excellent customer experience. Indicate how you measure and improve customer experience and satisfaction.	Answer in Full
R-94	How do you use technology to maximize opportunities for customers to make contact	Answer in Full
R-95	How do you use technology to resolve common queries	Answer in Full
R-96	Describe your usual approach to caller authentication	Answer in Full
R-97	Describe your usual approach to ensuring accuracy between information from Client systems and your CRM solution	Answer in Full
R-98	If your experience of caller authentication and maintaining accuracy between systems has involved integration/data transfer between your systems and your client's systems, please provide information about your experience of this and your usual approach to this area.	Answer in Full

8 Price

8.1 Pricing assumptions

All prices should be quoted in USD.

Pricing must be based on the volume assumptions below. Please provide as much background as possible on the pricing, including any explicit assumptions related to these metrics, the requirements and any factors outside of this document.

It is anticipated that requirements may change to meet service needs over time, so any limits, constraints and areas where flexibility is included in the pricing schedule should be highlighted.

Volume & Performance Estimations

Average number of Player/Public queries: 8,000 -10,000 per month of which approximately 1000 are Webchat. Additionally, there are around 1000 email contacts per month. The large majority (over 90%) of contacts will be via telephone.

Expect significant variation within this - very low volumes overnight, usual peaks during last few hours of ticket purchase for draws, extreme peaks in last few hours of ticket purchase before an unusually high multi-state roll-over (e.g. Powerball) jackpot draw.

#	Metric	
P-1	Calls abandoned %:	< 5%
P-2	Average Wait Time:	< 30 Seconds
P-3	Calls Answered within 30 Secs:	> 80%
P-4	Email Response:	> 95% within 24 hrs
P-5	First Time Resolution:	> 90%
P-6	Live Chat Response Time:	> 90% within 1 minute

8.2 Pricing Schedule

Section	Area, including but not limited to these tasks.	Assumptions / basis of pricings (Please indicate whether one-off or recurring for each price).	Price (USD)
P-7	Price for Set-up System development, Program Management		
P-8	Account Management Reporting, Service Management		
P-9	Training price for Course development, Staff Training		
P-10	Shared Agent Rate By Agent Role		
P-11	Dedicated Agent Rate By Agent Role		
P-12	Additional Fees & Charges		

Appendix A - Private Manager Agreement Incorporated Terms

See separate pdf file available on the Illinois Lottery website, reference - Private Manager Agreement Incorporated Terms.pdf