



## The Request for Proposal Approach to Purchasing a PBX

The Request for Proposal (RFP) method to purchasing a PBX system (see our article [PBX – Past, Present and Future](#)) helps a company in making a decision of which supplier to use and gives the vendors competing for that job opportunity to submit a bid based on a standardized list of requirements.

Soliciting proposals in this way will give you the opportunity to compare bids in terms of price and other features. It also allows you to make sure you have all the components needed to get what you want out of your phone system.

When making your final selection along with the response to your RFP, consider the outcome of any system demonstrations, feedback from those who use the system and your relationship with potential providers.

Since not all elements of a system will necessarily come from the same provider, it may be necessary to prepare separate RFPs for each system element – cable, network services, voicemail/processing systems and links to the computer network.

Once your company has decided a new PBX is needed and you have a budget in place, the next step is to detail what you want to accomplish with your new system. This step is crucial. Encourage representatives from all your company's departments to discuss and document what you want from your new system.

### **Discuss with Members of each Department:**

- What features you like from your present setup
- Which new features you need to add
- How handling of calls can be improved
- Issues to address from the perspective of customers, employees, system administrators and upper management



Diagram the current path a caller takes when they call in, and how the call gets to the right extension. Determine if you would like to keep this configuration, or if there is a more efficient way for callers to get to the correct destination. While you will almost never get full consensus from all employees, the more dialogue you engage in, the more successful you will be.

### **Could you Use a T-1?**

**Courtesy of Main Resource, Inc. Visit us at [www.MainResource.com](http://www.MainResource.com) or call 800 362-6740 for all your telecom needs.**

Before soliciting for a proposal, determine whether or not you could benefit from a T-1. If a regular phone line isn't enough for you (you have a lot of telephone and/or data traffic), a T-1 line may be the solution. The T-1 transfers digital signals at 1.544 megabits per second as opposed to 64 kilobits per second for a regular (ISDN) line.

On some systems, adding T-1 capability is simple, while on others that request may add thousands to your final cost. How do you know if you should consider a T-1? If your company spends over \$2000 a month in long distance calls, you may save money using a T-1. Call several providers and get their rates. When calling, make sure you have on hand your company's usage and traffic reports, this will help them determine whether a T-1 is for you or not. Allow the proposer to give you a price with and without T-1 capability, this comparison will help you evaluate the worth of utilizing T-1.

## **What to include in your Request for Proposal**

### *Introduction*

Describe your organization, including:

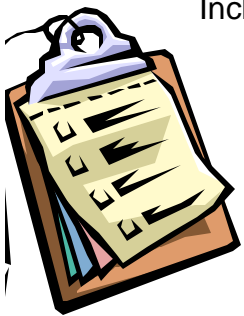
- The type of business
- How many locations do you have with how many employees?
- What are key departments and functions?
- What variables impact your business's success?
- What are your growth plans?

Describe in detail why you are purchasing a new PBX. List your objectives and desired timetable.

### *Outline your current environment and system operation*

Include:

- The manufacturer name, model, maintenance company of your current system
- How many lines and telephones of what types are connected to your current system?
- How your systems currently handles incoming, outgoing and internal calls
- What functions are working well for you and which need improvement, either now or down the line?



### *Describe your expectations regarding the new system*

Do you want:

- Better reporting capabilities?
- Functions like caller ID?
- Intra-office four digit dialing?

### *Provide System Specifications*

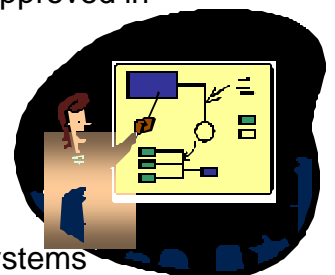
Include:

**Courtesy of Main Resource, Inc. Visit us at [www.MainResource.com](http://www.MainResource.com) or call 800 362-6740 for all your telecom needs.**

- The number and type of telephones - you will need to describe how calls are to be handled and whether you will need an LCD display. Avoid specifying by number of buttons, as the number of buttons you need for a set of features will vary considerably from manufacturer to manufacturer.
- How many switchboard consoles or screens you will need. This depends on what role they play in call coverage.
- The number and type of outside lines so that the proposer can determine the number and type of circuit boards needed.
- If you will be utilizing a voice mail system. This will occupy at least one port in the PBX.
- Growth projection. Determine whether you want to expand your system to fit future demand now, or if you just need it set up so that you can expand later if necessary.
- A request for a diagram of the control cabinet of the proposed system and an explanation of each component.
- A list of all the functions you want. Get ideas from PBX sales brochures. Include a brief definition of what you perceive the function to be.
- Your expectation in terms of how calls will be covered during and after hours.
- What you want in switchboard functions, user functions, system administration and management reports.
- How you want voicemail to work.
- The budget available.

*Other Items to incorporate:*

- Timetable for the project
- Installation and maintenance expectations
- Disaster Recovery Requirements (include battery backup needs)
- Any “red tape” you may encounter in getting a large purchase approved in a large company.
- Training requirements
- Documentation/record keeping requirements
- Equipment room and environmental requirements



*Tips for a more effective RFP:*

- Take advantage of the opportunity to view demonstrations of systems early on in the process. Try them out.
- Phrase questions clearly so that you will get answers that are easy to compare.

Even if you are sure of what you want, the Request for Proposal step is an important one. You ensure that you get everything you need and can compare cost with several suppliers

Outline of an Effective Request for Proposal:

**Courtesy of Main Resource, Inc. Visit us at [www.MainResource.com](http://www.MainResource.com) or call 800 362-6740 for all your telecom needs.**

- I. Description of telephone operating System
- II. Required system capabilities
- III. Desired system capabilities
- IV. System Specifications
- V. Provide optional pricing for some items
- VI. Additional Information requested
- VII. Maintenance Support Requirements



Main Resource, Inc.  
74 Evergreen Drive  
Portland, ME 04103-1066  
800 397-8417

[All Contents copyright 2000, Main Resource, Inc. All rights reserved.](#)

**Courtesy of Main Resource, Inc. Visit us at [www.MainResource.com](http://www.MainResource.com) or call  
800 362-6740 for all your telecom needs.**