

Work Request K2073 for NGCC Feasibility Study

Reference Check

Vendor Co Name: Integrated Solution Group	Date: 11/8/22
Consultant, if applicable: Emily Davis/Brenda Hays	Evaluator: Michael C. Pratt
Reference Name/Co: Annette Roth/ARTS Commission	

1. What type of work/project did the vendor or consultant do for the named reference? What was the time period? (2022) July to September to do a feasibility study and a decision package.

Notes: Emily – PM

Brenda – Research and backup to Emily.

- a. What was the vendor’s or consultant’s role on the project?

Notes: Emily – PM

Brenda – Backup PM

- b. Was the work specifically related to a feasibility study, contact centers, or telephony?

Notes: Emily – Feasibility Study for CRM.

Brenda – Feasibility Study for CRM.

2. Please describe the quality and accuracy of the consultant’s work products and documentation, including how you would rate on a scale from 1 – 10 (10 being the best)?

Notes: Emily – 10 very aware of needs and went above and beyond.

Brenda - 10

Doing benchmarking up to 8 using a tool to help decide how relevant the benchmarking was for the size of the organization. This was a large project for the agency and having them there was helpful and put it in normal terms.

3. Was there ever a time when the consultant’s work did not meet your initial expectations, and needed rework?

Notes: Emily and Brenda – Not at all even the decision package and when they got it back it was nearly perfect.

4. Did the work done for you by the Vendor’s professional services staff include the following areas?

- a. Requirements gathering - Emily: Brenda: Yes both

- b. Analysis - Emily: Brenda: yes both

- c. Market research - Emily: Brenda: yes both

If so, how would you describe their competence for each?

Notes: Emily – focused on the requirements and market research and made sure people were meeting benchmarks and had a great relationship with the QM team. Smoothed out two consulting teams so that things did not become territorial.

Brenda – created a hundred-point qualifications from the research with staff and categorized it logical and made sense compared to the agency needs. The methodology made the process go much quicker.

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5. How would you describe the vendor's or consultant's ability to facilitate and coordinate with those in your organization to complete the deliverables?
 - a. SME's?
 - b. Management/leadership level stakeholders?
 - c. Did they form positive working relationships with your staff?

Notes: Emily and Brenda – as the leader/PM and the interviews appreciated the conversation and both were involved in the interviews. They brought different lenses to get everyone on board.

Both met with executives and managers and administrative staff who would use the CRM and there was no negative feedback.

6. How usable were the documented deliverables received?
 - a. Were they helpful in the following phase of the work/project?
- Notes: Emily and Brenda – Extremely usable and easy to understand and the study went into the decision package and was ranked at number 14.

7. If any type of management/leadership presentation of final findings or results was included as part of the work, how would you describe the vendor's or consultant's presentation skills?

Notes: Emily and Brenda – The presentations were very good, we wanted to make sure they could speak in non-tech terms, and they could do that. They helped make the leadership aware of how important this was compared to other packages that were happening. Executives understood how important this was.

8. How would you describe your overall satisfaction with the vendor or consultant, and would you work with them again for similar work?

Notes: Emily and Brenda – Fantastica and would work with both again. They are hoping to work with them again if possible. Hope to have their assistance with navigating through the future work as well.

9. Were there any challenges during the term of the contract that were difficult to resolve?

Notes: Emily and Brenda – the challenge was the timeline as it was very short and tight and were sprinting the entire time. Getting off the ground at the beginning as there was no realization on how much they would need to focus on this. They did a great job bringing things on track.

10. Is there any other information you think is helpful for us to know about the vendor/consultant or your experience working with the vendor or consultant?

Notes: Brenda and Emily – They did a great job, and the mythology was good but appreciated the most during the decision package there was an understanding about the agency and what they needed. They felt like they had a vested interest in seeing the outcome.

Both were personable and warm and easy to connect with. The working relationship was very congenial.

They were willing to look at the big vendors but also look at some of the out of the box vendors.

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Vendor Co Name: Integrated Solution Group	Date: 11/8/22
Consultant, if applicable: Robert J. Kennedy	Evaluator: Michael C. Pratt
Reference Name/Co: Brian Hall/Continuant	

1. What type of work/project did the vendor or consultant do for the named reference? What was the time period?

Notes: Various amounts of Avia both support/break fix and implementation and upgrades on Avia and voicemail platforms. Sonus and Ribbon and TEAMS for business. Tied old legacy into Skype and TEAMS. This was over a span of 10-12 years.

- a. What was the vendor's or consultant's role on the project?

Notes: Usually worked in parallel and he was the lead engineer and vice versa. Sr. T3 for break fix.

- b. Was the work specifically related to a feasibility study, contact centers, or telephony?

Notes: Telephony and Contac Centers. Feasibility studies and proof of concepts for TEAMS and tying into legacy. Avaya TS and deployment in the area.

2. Please describe the quality and accuracy of the consultant's work products and documentation, including how you would rate on a scale from 1 – 10 (10 being the best)?

Notes: Bob was very thorough with a core of 9-10 and especially for documentation and root cause analysis.

3. Was there ever a time when the consultant's work did not meet your initial expectations, and needed rework?

Notes: Yes, since they were colleagues, they worked together, and this was usually a perspective thing or during peer review it had issues but needed to be fined tuned together.

4. Did the work done for you by the Vendor's professional services staff include the following areas?

- a. Requirements gathering - Yes

- b. Analysis - Yes

- c. Market research – No but if needed a product that was not normal, he did research that.

If so, how would you describe their competence for each?

Notes: Bob was very thorough. He would look through both minimum requirements and best practices to meet what the clients needed.

5. How would you describe the vendor's or consultant's ability to facilitate and coordinate with those in your organization to complete the deliverables?

- a. SME's?

- b. Management/leadership level stakeholders?

- c. Did they form positive working relationships with your staff?

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Notes: Worked well with the SMEs on the tech level and with leadership was concise and to the point. Bob had positive work relationships. Bob was able to adjust and explain.

6. How usable were the documented deliverables received?

a. Were they helpful in the following phase of the work/project?

Notes: Usable as reference once the project was complete and could use it as a run book in some cases.

7. If any type of management/leadership presentation of final findings or results was included as part of the work, how would you describe the vendor's or consultant's presentation skills?

Notes: Very good and especially for root cause presentations gave good descriptions of what was encountered. Bob keeps things to the point and can explain what took place and could answer questions.

8. How would you describe your overall satisfaction with the vendor or consultant, and would you work with them again for similar work?

Notes: Would work with Bob again and was very satisfied.

9. Were there any challenges during the term of the contract that were difficult to resolve?

Notes: Bobs experience spanned the legacy to the current and was able to work through issues.

10. Is there any other information you think is helpful for us to know about the vendor/consultant or your experience working with the vendor or consultant?

Notes: Bob works through issues and interacts with others to get the job done. Has a great memory and could reach back to the past.

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Vendor Co Name: Integrated Solution Group	Date: 11/4/22
Consultant, if applicable: Robert J. Kennedy	Evaluator: Michael C. Pratt
Reference Name/Co: Gasper Gulotta/Continuant	

1. What type of work/project did the vendor or consultant do for the named reference? What was the time period?

Notes: Bob worked 2013-2018 as the chief engineer for a private telecommunications company and was the key engineer that handled all of the call work for PBX/Unified systems. Was the tech that lead all of the engineering teams.

- a. What was the vendor's or consultant's role on the project?

Notes: Lead Engineer for 4 teams of a total of 100 engineers.

- b. Was the work specifically related to a feasibility study, contact centers, or telephony?

Notes: work was related to all 3. Bob was the expert.

2. Please describe the quality and accuracy of the consultant's work products and documentation, including how you would rate on a scale from 1 – 10 (10 being the best)?

Notes: Bob was a 10 for quality and documentation. He was chosen to be the lead due to the quality of his work. He did the hands-on work and led with the teams in this manner. He is everything from the vision/planning to the practical work as well.

3. Was there ever a time when the consultant's work did not meet your initial expectations, and needed rework?

Notes: Bob worked in a collaborative way and always exceeded expectations.

4. Did the work done for you by the Vendor's professional services staff include the following areas?

- a. Requirements gathering - yes
- b. Analysis - yes
- c. Market research - yes

If so, how would you describe their competence for each?

Notes: Requirements – knows the nuts and bolts of what needs to be done and is an expert of gathering requirements.

Analysis – Expertise in the field to look over options and can talk about the pros/cons on what needs to be used.

Market Research – Had to know what other systems they were competing with and from a technical perspective Bob understands how systems interact if they can work together or build a new system.

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5. How would you describe the vendor's or consultant's ability to facilitate and coordinate with those in your organization to complete the deliverables?
- SME's? Bob as chief engineer worked with multiple teams, and he worked with the SMEs in the various fields. Very adept with working with SMEs.
 - Management/leadership level stakeholders? Bob was able to talk with management in a way that others could understand the technical information. Leadership was focused on his technical expertise and his years of experience.
 - Did they form positive working relationships with your staff? – Yes, very collaborative and a problem solver and focused on solutions/fixes.

Notes: Some engineers are hard to work with but Bob has a way to work collaboratively with others that is very well received.

6. How usable were the documented deliverables received?
- Were they helpful in the following phase of the work/project?

Notes: Documentation such as Visio or network diagrams was always on target and well done and gave recommendations that came from a place of good thought from the team.

7. If any type of management/leadership presentation of final findings or results was included as part of the work, how would you describe the vendor's or consultant's presentation skills?

Notes: Bob is a technical leader and a facts person; he will focus on the technical issues and how Business and meet their objectives. Direct technical person.

8. How would you describe your overall satisfaction with the vendor or consultant, and would you work with them again for similar work?

Notes: Yes, work with Bob and he is the go-to person and if the job has anything to do with Call Centers and he is the guy to call. Bob is well rounded in telecommunication systems.

9. Were there any challenges during the term of the contract that were difficult to resolve?

Notes: Bob worked with several hundred customers and there were challenges to maintain systems. Bob was the trouble shooter and with Bob their challenges were resolved because he was leading. Bob is always respectful and a very strong lead engineer.

10. Is there any other information you think is helpful for us to know about the vendor/consultant or your experience working with the vendor or consultant?

Notes: One of the things about working with Bob that is so enjoyable is his breadth of experience. He knows all the major call centers and communication systems, their pros/cons and how they integrate. He will give advice you can really count on.

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Vendor Co Name: N/A	Date: 11/4/2022
Consultant, if applicable: Brenda Hays	Evaluator: Julie Hindman
Reference Name/Co: Julie Moreau – United Health Group	

1. What type of work/project did the vendor or consultant do for the named reference? What was the time period?

Notes: Reference have been away from UHG for 4 years. Work was 5-6 years ago.

Infrastructure group in charge of disaster recovery. At the time, UHG did not have a disaster recover environment, Brenda worked on the effort to put infrastructure that was duplicated into 2 new data centers. Made sure the infrastructure could handle a fail over within minutes. Brenda worked on the disaster recovery work when it was still done on paper.

- a. What was the vendor's or consultant's role on the project?

Notes: Was in charge of the DR plans and coordinating the drills of the plans. It was her job to understand what was changing in the environments at all times and update the tests and run the test successfully. E2E systems thinker as she had to understand all the dependencies and their impacts to the entire system.

- b. Was the work specifically related to a feasibility study, contact centers, or telephony?

Notes: Not specifically feasibility studies, but as a business analyst she documented requirements, verifying existing system work.

2. Please describe the quality and accuracy of the consultant's work products and documentation, including how you would rate on a scale from 1 – 10 (10 being the best)?

Notes: 9-10

In DR you cant make mistakes. The work she had to do on paper that was very detailed and really understand what has happening in order to get it right. Never had to talk with Brenda about quality of work or missing deadlines. Very good at building relationships with the stakeholders. Had great engagements with stakeholders and tech partners.

3. Was there ever a time when the consultant's work did not meet your initial expectations, and needed rework?

Notes: No.

4. Did the work done for you by the Vendor's professional services staff include the following areas?

- a. Requirements gathering
- b. Analysis
- c. Market research

If so, how would you describe their competence for each?

Notes: Requirements gathering and analysis were the biggest part of her job. NO market research was done. Had to either create a new DR plan or update an existing plan, and that required

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documenting existing bus requirements and new requirements in order to ensure the right environment setup for tests. Only Tier 1 and Tier 2 apps had rapid recovery and Brenda had to understand what environment was needed to ensure the T1 & T2 apps needed to run correctly and what non T1 & T2 apps were required to run correctly. Had to understand and analyze the interfaces of these applications.

5. How would you describe the vendor's or consultant's ability to facilitate and coordinate with those in your organization to complete the deliverables?
 - a. SME's?
 - b. Management/leadership level stakeholders?
 - c. Did they form positive working relationships with your staff?

Notes: Yes on the positive relationships with staff. Not only good at what she does, but is fun and has a very positive outlook. She not only worked with detailed technical people and run plans and exercises with VPs and CIOs watching and participating. The work she did was highly visible at UHG.

6. How usable were the documented deliverables received?
 - a. Were they helpful in the following phase of the work/project?

Notes:

7. If any type of management/leadership presentation of final findings or results was included as part of the work, how would you describe the vendor's or consultant's presentation skills?

Notes: Confident and organized. Brenda was also a professor teaching college classes so she did great at presenting at any level whether line staff or Sr. Level Executives.

8. How would you describe your overall satisfaction with the vendor or consultant, and would you work with them again for similar work?

Notes: Would work with her again in a heartbeat. I would take her back into my group any day. Brought great engagement

9. Were there any challenges during the term of the contract that were difficult to resolve?

Notes:

10. Is there any other information you think is helpful for us to know about the vendor/consultant or your experience working with the vendor or consultant?

Notes:

No concerns recommendation Brenda for this position.

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Vendor Co Name:	Date: 11/08/2022
Consultant, if applicable:	Evaluator: Julie Hindman
Reference Name/Co: Michael MacKillop	

1. What type of work/project did the vendor or consultant do for the named reference? What was the time period?

Notes: Still working with Michael. Got funds to revamp some food service operations. Being a small agency with only 3 staff in the program, realized couldn't do it by themselves. Emily listened well and really took the burden of the effort off of the team and made them aware of the intricate details that they need to address.

They also had to redo their decision package to ask for funding. There was a lot the DBS left out of the DP, and Emily caught these items and helped the group revamp their DP. Made some crazy tight deadlines and did an amazing job of planning the work within the 30 days to capitalize on the funding that would go away at the end of June.

2. What was the vendor's or consultant's role on the project?

Notes: Background Support the project manager of the effort. Emily was also responsible for developing the decision package. She understands the legislative project and knows how to justify. Emily is also leading a feasibility study for them about food services options going forward to ensure blind owners have viable businesses.

- a. Was the work specifically related to a feasibility study, contact centers, or telephony?

Notes: Yes Feasibility Study

3. Please describe the quality and accuracy of the consultant's work products and documentation, including how you would rate on a scale from 1 – 10 (10 being the best)?

Notes:

Score: 10

Accuracy is incredible. Attention to detail is great. Uncovered many components they were not thinking about.

4. Was there ever a time when the consultant's work did not meet your initial expectations, and needed rework?

Notes:

Nope.

5. Did the work done for you by the Vendor's professional services staff include the following areas?

- a. Requirements gathering
- b. Analysis

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c. Market research

If so, how would you describe their competence for each?

Notes:

A lot of what Emily is doing is research and market analysis. They are trying to revamp their business model program. This is where Emily shines.

6. How would you describe the vendor's or consultant's ability to facilitate and coordinate with those in your organization to complete the deliverables?
- SME's?
 - Management/leadership level stakeholders?
 - Did they form positive working relationships with your staff?

Notes:

Emily and ISG strength is working with people and building relationships. They have encountered a program manager who sees things negatively, but Emily is able to bring him to a productive view point and let him see the positivity. She can skillfully work with more challenging staff. Emily has deep professional skills in having challenging conversations with stakeholders regarding what is needed what is missing.

7. How usable were the documented deliverables received?
- Were they helpful in the following phase of the work/project?

Notes:

Yes, early in the project, but the work that was done towards the DP was incredibly useful. The content is complex and there have been many conversations with the legislative liaisons and OFM budget managers and Emily has done a great job.

8. If any type of management/leadership presentation of final findings or results was included as part of the work, how would you describe the vendor's or consultant's presentation skills?

Notes:

Presentation skills are great. She presents to legislative/budget partners and has done a wonderful job.

9. How would you describe your overall satisfaction with the vendor or consultant, and would you work with them again for similar work?

Notes: Yes. Emily's work is wonderful and she has done and continues to do a great job.

10. Were there any challenges during the term of the contract that were difficult to resolve?

Notes: No.

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11. Is there any other information you think is helpful for us to know about the vendor/consultant or your experience working with the vendor or consultant?

Notes:

ISG's original resources wasn't a good fit, and ISG went and found Emily and it was a much better fit.

100% would recommend Emily and ISG for any engagement.

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Vendor Co Name: ISG	Date: 11/09/2022
Consultant, if applicable: Tom Boatright	Evaluator: Julie Hindman
Reference Name/Co: Cristie Fredrickson	

1. What type of work/project did the vendor or consultant do for the named reference? What was the time period?

Notes: ISG performed a Feasibility Study for Department of Ecology focused on Content Management. At the time of the feasibility study and contracted work with ISG, I worked at Ecology as their agency CIO. I am no longer with Ecology.

The scope was Ecology content management requirements, using MS M365 offerings, in the government offering of the WaTech shared tenant. Timeframe was 2019 (going from memory, but Ecology could verify).

- a. What was the vendor's or consultant's role on the project?

Notes: Performed the technical feasibility study, including validation of business requirements against the MS M365 offerings specific to the government offering (not commercial) and being viable within the WaTech shared tenant configuration.

- b. Was the work specifically related to a feasibility study, contact centers, or telephony?

Notes: Ecology submitted a decision package seeking funds to implement a content management system. Instead, a feasibility study was requested and funded. This feasibility study was the result, specific to content management.

2. Please describe the quality and accuracy of the consultant's work products and documentation, including how you would rate on a scale from 1 – 10 (10 being the best)?

Notes: The work products met or exceeded contract requirements or expectations.

3. Was there ever a time when the consultant's work did not meet your initial expectations, and needed rework?

Notes: The scope of the project did change during the life of the project. Re-work was needed; at the request of Ecology. At project initiation E3 licenses were standard, and agencies could purchase E5 licenses as needed to meet agency business and technical needs. The scope of the feasibility study included an outcome of a comparison/recommendation of license level and functionality offerings. During the project, WaTech announced E5 licenses as the standard for all agencies. Re-worked was needed, but it was out of the vendors control that the scope changed. We worked together to update the scope and expectations accordingly.

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4. Did the work done for you by the Vendor's professional services staff include the following areas?
 - a. Requirements gathering
 - b. Analysis
 - c. Market research

If so, how would you describe their competence for each?

Notes: I recall the agency business requirements analysis was completed prior to the initiation. Analysis and market research was included in the scope of the feasibility study, specific to M/0365 offerings, commercial vs government offerings, and WaTech Shared tenant configurations.

5. How would you describe the vendor's or consultant's ability to facilitate and coordinate with those in your organization to complete the deliverables?
 - a. SME's?
 - b. Management/leadership level stakeholders?
 - c. Did they form positive working relationships with your staff?

Notes: The interactions were professional, planned, and detailed. They were prepared, led and organized discussions and work sessions, able to handle questions/inquiries/new ideas in a manner that you would expect from an experienced consultant, all with an eye toward progress and actionable next steps. They successfully integrated themselves into the team to create effective working relationships. They interacted with the audience appropriately, at the technician level and the executive level.

6. How usable were the documented deliverables received?
 - a. Were they helpful in the following phase of the work/project?

Notes: From my lens as Sponsor, the deliverables were helpful and useful. For more detailed response I recommend connecting with Louis Turbeville, Ecology Senior Specialist Project Manager (he is now the PMO Manager). He worked closely with the ISG team on this project.

7. If any type of management/leadership presentation of final findings or results was included as part of the work, how would you describe the vendor's or consultant's presentation skills?

Notes: Polished, professional, but also easy to digest the dense information. They presented to various groups within the agency, including IT, business, and records management.

8. How would you describe your overall satisfaction with the vendor or consultant, and would you work with them again for similar work?

Notes: All deliverables were on time, with the quality expected. For future engagements, we would leverage the approved DES procurement processes to select / engage with vendors.

9. Were there any challenges during the term of the contract that were difficult to resolve?

Notes: Not to my knowledge.

10. Is there any other information you think is helpful for us to know about the vendor/consultant or your experience working with the vendor or consultant?

Notes: N/A

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Vendor Co Name: Health Benefit Exchange	Date: 11/07/2022
Consultant, if applicable: Tom Boatright	Evaluator: Julie Hindman
Reference Name/Co: Randi Schaff	

1. What type of work/project did the vendor or consultant do for the named reference? What was the time period?

Notes: 2017 – Short in duration over 2 ½ months. Scope of work was based on procurement needs for the Affordable Care Act, they needed to do an assessment of what they had and what was out there to reprocur call center services.

- a. What was the vendor’s or consultant’s role on the project?

Notes: Principal Project Manager and had an additional staff person to assist.

- b. Was the work specifically related to a feasibility study, contact centers, or telephony?

Notes: Yes

2. Please describe the quality and accuracy of the consultant’s work products and documentation, including how you would rate on a scale from 1 – 10 (10 being the best)?

Notes: 9 or 10

Was very please with the work they did for us.

3. Was there ever a time when the consultant’s work did not meet your initial expectations, and needed rework?

Notes: No.

4. Did the work done for you by the Vendor’s professional services staff include the following areas?

- a. Requirements gathering
- b. Analysis
- c. Market research

If so, how would you describe their competence for each?

Notes: Asked for looking at requirements from technology to finance model to support an RFP because they outsource their call center for the Health Benefit Exchange.

Reached out to other states that outsource their exchanges and gathered their contracts to see how they setup their procurement. They data provided met the scope of work asked for, was well done, and very useful in decision making.

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5. How would you describe the vendor's or consultant's ability to facilitate and coordinate with those in your organization to complete the deliverables?
 - a. SME's?
 - b. Management/leadership level stakeholders?
 - c. Did they form positive working relationships with your staff?

Notes: Very small group he worked with, not a cross-organization body of work. He was very responsive and organized and was in constant contact with the team. He was talking to the COO, and the project team, along with speaking with the existing vendor to understand the current state. They wanted an unbiased opinion speaking with vendor and did a great job.

6. How usable were the documented deliverables received?
 - a. Were they helpful in the following phase of the work/project?

Notes: Yes, they learned a lot of other states exchanges and created a framework of requirements that they relied on heavily when they wrote the RFP that went out in 2018.

7. If any type of management/leadership presentation of final findings or results was included as part of the work, how would you describe the vendor's or consultant's presentation skills?

Notes: Provided a presentation multiple times throughout the project. Facilitated a meeting with the leadership folks. PowerPoints were well put together, ensured the materials would meet their needs prior to the presentation. Well done.

8. How would you describe your overall satisfaction with the vendor or consultant, and would you work with them again for similar work?

Notes: Yes I would. Tom was very responsive. Had a really good sense of how to engage and was not afraid to ask the question needed to move the project along. Would certainly engage with ISG again in the future.

9. Were there any challenges during the term of the contract that were difficult to resolve?

Notes: No.

10. Is there any other information you think is helpful for us to know about the vendor/consultant or your experience working with the vendor or consultant?

Notes: Had a really great working relationship. ISG was the original PMO for establishing the Exchange, but Tom was knew to them for this effort and he lived up to the reputation of his past peers.

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Vendor Co Name: Integrated Solution Group	Date: 11/7/22
Consultant, if applicable: Robert J. Kennedy	Evaluator: Michael C. Pratt
Reference Name/Co: James Paige/Continuant	

1. What type of work/project did the vendor or consultant do for the named reference? What was the time period?

Notes: 30 years in the military and hired by Continuant in 2004 and was there for 15 years and Bob was there the entire time. Continuant is a managed services organization and went into more implementation later. Jim was the engineer manager and director of Operations and worked with Bob as his manager during that time frame. Bob was promoted to Chief Engineer with more than 100 through the USA and a few international members.

- a. What was the vendor's or consultant's role on the project?

Notes: Expertise was in all the Avia systems but kept abreast of all technologies.

- b. Was the work specifically related to a feasibility study, contact centers, or telephony?

Notes: Bob led the way for E911 Call Centers for Washington State and EMS to upgrade from 911. Global implementation of TEAMS for VOIP systems and Bob ensured migration from Avia to TEAMS went very smoothly. Bob is a Call Center expert that can bridge the gap between the legacy and the newer systems.

2. Please describe the quality and accuracy of the consultant's work products and documentation, including how you would rate on a scale from 1 – 10 (10 being the best)?

Notes: Bob is very meticulous and detailed particularly with complex policies and things can get out of wack and should be considered a 10 in documentation and understanding of the project itself. Bob would be on site and work with agents to make sure things are done right. Bob could grasp all different technologies and would spend the research time to make sure things were exact.

3. Was there ever a time when the consultant's work did not meet your initial expectations, and needed rework?

Notes: Always something that can go wrong, and it is never perfect with unknowns but when things went wrong Bob would be the guy who was called to straighten things out. For example, hospitals have huge battery stacks for Nortel and Bob know how/what they were, and everything went wrong but Bob went on site within 24 hours was able to fix it.

4. Did the work done for you by the Vendor's professional services staff include the following areas?

- a. Requirements gathering - Yes
- b. Analysis - Yes
- c. Market research - NA

If so, how would you describe their competence for each?

Notes: Bob is an expert particularly around gather data and applying it to the project. When a PM got stuck they went to Bob for help.

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5. How would you describe the vendor's or consultant's ability to facilitate and coordinate with those in your organization to complete the deliverables?

- a. SME's?
- b. Management/leadership level stakeholders?
- c. Did they form positive working relationships with your staff? Yes, they all loved Bob.

Notes: Excellent – and was referred to as a SME. Bob considers himself to be an engineer, but Jim believes he is a SME for Call Centers. The implementation team and PM's and educations considered Bob the go-to guy.

6. How usable were the documented deliverables received?

- a. Were they helpful in the following phase of the work/project?

Notes: Documentation was well received and returned to often.

7. If any type of management/leadership presentation of final findings or results was included as part of the work, how would you describe the vendor's or consultant's presentation skills?

Notes: Bob is very articulate and would know the information inside and out.

8. How would you describe your overall satisfaction with the vendor or consultant, and would you work with them again for similar work?

Notes: Bob would be the first person on Jim's list if he came out of retirement. You do not want Bob working for your competition, he is the one you want on your team and do whatever it takes to keep him.

9. Were there any challenges during the term of the contract that were difficult to resolve?

Notes: There were times with technology and there were times where Avia was the largest service areas, but they were able to gather customers from Avia and had some difficult times with the older legacy systems. Bob knew all the systems even from the 80s up to current, there is not much he does not know. The legacy systems had legal boundaries, but Bob could help customers. Tyson foods had one of the oldest systems and they would not upgrade but Bob could keep the older systems up and running. Tyson was about chicken and not about phones.

The more modern systems such as TEAMS regarding working with international customers and displacing the Avia system.

10. Is there any other information you think is helpful for us to know about the vendor/consultant or your experience working with the vendor or consultant?

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Notes: Jim really admires Bob he is one of the best people ever met and he didn't become a Chief Engineer because he couldn't do it, but he was it. The issue was working across different parts of the organization (sales, customer service...), Bob is the guy that can keep the people happy.