



EXECUTIVE SUMMARY

Recommendation that the Broward College District Board of Trustees authorize the non-standard agreement with BlackBeltHelp LLC for ITN-2023-055-TP- CONTACT CENTER SERVICES to provide Broward College with Contact Center-as-a-Service for the One-Stop and Help Desk lines of business for an initial term of three (3) years for FY2024/2025, FY2025/2026 and FY2026/2027. Fiscal Impact: Est. \$2,750,171.91 for the initial three (3) year contract.

Presenter(s): Janice Stubbs, Vice President of Student Services

What is the purpose of this contract and why is it needed? Recommendation for the Board of Trustees to authorize the non standard agreement with BlackBeltHelp, LLC for ITN-2023-055-TP - CONTACT CENTER SERVICES as a means of providing Broward College with Contact Center-as-a-Service for the One-Stop and Help Desk lines of business for an initial term of three (3) years for FY24/25, FY25/26 and FY26/27 with three (3), one (1) year renewal options after the initial term FY27/28. One-Stop phone and chat support for student services handles roughly 150,000 live (predominantly phone) interactions on average per year that includes but are not limited to the following areas: Application processes and statuses, transcript support, personal information updates, adding and dropping classes, tuition payment information and support, important dates (start dates, last day to withdraw, etc.), residency completion, status and completion of petitions, financial aid support (how to apply, types of aid, account status, missing documents, verification, award summaries), veterans information. Help Desk phone and chat support handles roughly 38,000 live (predominantly phone) interactions on average per year that includes but is not limited to the following areas: network connectivity, productivity applications, antivirus and security utilities, learning management system, email support, password and account resets, operating system support (Windows, Mac OS, etc.), computer related issues, how to post discussions or submit a quiz, class roster issues, course assignment issues, and classroom technology issues. The agreement is needed in order for Broward College to enter a partnership with BlackBeltHelp, LLC whom was determined to be the most qualified, responsible, responsive, and best value respondent to the college after review of short-listed respondents for the Invitation to Negotiate ITN-2023-055-TP - CONTACT CENTER SERVICE. The decision to recommend award to BlackBeltHelp, LLC was based on several key factors such as services offerings including unique technology offerings (unlimited use of AI chat and voice bots), dedicated agent support models for One-Stop and Help Desk, bilingual live agent support (English and Spanish), seamless integration capabilities into current Broward College software tools (i.e. Banner, Salesforce, TeamDynamix, and D2L), industry leading service levels, 24/7/365 support, customer service, availability and response time, technical expertise, cost, and value proposition. The college will save costs for contact center as-a-service on a year to year basis while gaining service improvements (listed above) by partnering with BlackBeltHelp, LLC.

What procurement process or bid waiver was used and why? The procurement process selected was a competitive solicitation per College Procedure A6Hx2-6.34 and FLDOE Rule 6A14-0734. Broward College engaged in an Invitation to Negotiate (ITN-2023-055-TP - CONTACT CENTER SERVICES) over the course of 2023 and 2024 to search out a Contact Center-as-a-Service provider that would enhance contact center operations by providing additional service options at a more efficient cost to the College. Broward College has reached the final term of the Blackboard, Inc. contract for Contact Center-as-a-Service (ITN-2018-005-ZR) and thus, initiated the search for a new service vendor in order to provide due diligence to the College and secure a partnership that would provide improved services at a reduced cost.

Is this a budgeted expenditure from the budget established at the last June Board of Trustees meeting?

Yes, this is part of the approved budget.

What fund, cost center and line item(s) were used? FD100, FD108, FD201, CC0728, CC0288 and GLC: 64500: Other Services.

Has Broward College used this vendor before for these products or services? Not Applicable.

Was the product or service acceptable in the past? Not Applicable. Broward College has not used BlackBeltHelp, LLC services in the past.

Was there a return on investment anticipated when entering this contract? No.

Was that return on investment not met, met, or exceeded and how? Not Applicable.

Does this directly or indirectly feed one of the Social Enterprise tactics and how? No.

Did the vendor amend Broward College’s legal terms and conditions [to be answered by the Legal Office] if the College’s standard contract was used and was this acceptable to the Legal Office?

The General Counsel's office has reviewed the agreement and any deviation to the College's standard terms has been deemed acceptable.

FISCAL IMPACT:

Description: \$2,750,171.91 using worktags CC0728, CC0288, BU202, BU301, FD100, FD108, FD201, PG000164, PG000494, PG000480 (FD2). Est. \$916,723.97 per year with a cumulative estimated total of \$2,750,171.91 for the initial three (3) year contract.one (1) year renewal options after the initial term FY27/28.

04/30/24	CC0288 • Technology Fee Plan	(\$951,840.98)
	1/3 of split with One Stop Support, Chatbot, and Help Desk Support Incident	

04/30/24	CC0728 • Contact Center Operations	(\$1,798,330.93)
	One Stop Support Incidents, Advisor Desktop License, Price Escalation Adjustment	

TOTAL:	(\$2,750,171.91)
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Jeffrey Nasse

Jeffrey Nasse, Provost and SVP of Academic Affairs

4/30/2024

APPROVAL PATH: 12138 BlackBeltHelp LLC (ITN-2023-055-TP - Contact Center Services)

 **Workflow**

 Edit View

 Add Work Item

Stage	Reviewer	Description	Due Date	Status	
1	Jeffrey Nasse	Provost and SVP of Academic Affair		 Completed	
2	Natalia Triana-Aristizabal	Contracts Coordinator		 Completed	
3	Zaida Riollano	Procurement Approval 		 Completed	
4	Rabia Azhar	CFO Review		 Completed	
4	Christine Sims	Budget Departmental Review		 Completed	
4	Legal Services Review Group	Review and Approval for Form and		 Completed	
5	Board Clerk	Agenda Preparation		 Pending	
6	District Board of Trustees	Meeting	08/20/24 08:30 AM	 Pending	
7	Electronic Signature(s)	Signatures obtained via DocuSign b		 Pending	
8	Natalia Triana-Aristizabal	Contracts Coordinator		 Pending	

BLACKBELTHELP MASTER LICENSE AND SERVICES AGREEMENT**CONTACT INFORMATION****Client**

Organization Name:	The District Board of Trustees of Broward College, Florida
Principal Address:	111 East Las Olas Boulevard, Fort Lauderdale, FL 33301
Address for Legal Notices:	111 East Las Olas Boulevard, Room 253, Fort Lauderdale, FL 33301

Client Contacts

Primary Point of Contact

Name:	Torey Brignolo
Title:	Senior Director, Contact Center Operations
Email:	tbrignol@broward.edu
Phone:	(954) 201-7350

Authorized Signatory Point of Contact

Name:	Torey Brignolo
Title:	Senior Director, Contact Center Operations
Email:	tbrignol@broward.edu
Phone:	(954) 201-7350

Purchasing Point of Contact

Name:	Orlando Aponte
Title:	Procurement Officer
Email:	procurement@broward.edu
Phone:	(954) 201-7455

Legal/Notices Point of Contact

Name:	Office of the General Counsel
Title:	Office of the General Counsel
Email:	legalservices@broward.edu
Phone:	(954) 201-7409

BlackBeltHelp – Master License and Services Agreement

AGREEMENT DETAILS

Effective/Start Date:	08/30/2024
End Date:	08/29/2027
Initial Term:	3 years beginning of the effective date
Renewal Term(s):	Three (3), one (1) year renewal options after the Initial Term.

Notes:

<p>The BlackBeltHelp- Master License and Services Agreement Terms and Conditions are amended as follows:</p> <ol style="list-style-type: none"> Section 3.1.1 is amended to read as follows: "Client (i) hereby grants to Provider and Partners a royalty-free, worldwide, perpetual, irrevocable, transferable, and unlimited license to access, use, modify, reproduce, distribute, create derivative works from, any Client Asset only during the term of the Agreement and solely for the purpose of fulfilling their obligations in accordance with this Agreement; and (ii) represents and warrants that it has the right to grant the license to the Client Asset set forth herein." Section 4.2 is amended to read as follows: "Client has the sole responsibility for the preparation, entry, use, maintenance, and protection of any Client Content it uses in connection with all Assets. Provider or Partners shall have no duty or obligation to monitor Client's Content." In Section 4.6 the part "...as approved by Provider" stands omitted. In Section 5.4 the last sentence stands omitted. In Section 6.5, the following proviso has been added before the end of the sentence: "...provided that the features and functionality will not be materially diminished." In Section 7.2 after the part "...conjunction with Provider's Services..." the part "...that were not provided by Provider" has been inserted. In Section 9.1.1. the number of years has been changed from "five (5)" to "three (3)" years. Section 9.1.2. is amended to read as follows: "This Agreement may be renewed for three (3), one (1) year renewal periods after the Term ("Renewal Term"). Such renewal must be writing and signed by both Parties." In Section 9.2.1. the following part "...on the election of either party, communicated in writing as set forth in Section 9.1.2" stands omitted. Section 9.2.2. is amended to read as follows: "In the event Client fails to pay any undisputed fees when due, Provider may terminate this Agreement but only after providing written notice to Client and thirty (30) days to cure the non-payment;" In Section 9.2.3. the following part "...including but not limited a material breach of the Attachment A, Section III the Confidentiality Agreement" stands omitted. Section 10.1(i) is amended to read as follows: "Client shall compensate the Provider for all authorized and accepted deliverables and/or services completed through the date of termination in accordance with Schedule C - Statement of Work Summary." Section 10.3. stands omitted in its entirety. In Section 11.11, the following part has been added as proviso at the end of last sentence: "...provided however, that this shall not apply to general, non-targeted advertisements of employment opportunities." In Section 11.13. reference "Schedule B-Client's Terms and Conditions and Schedule C- Statement of Work- Summary" has been added. In Section 2.2. of Attachment A Section I: Community Development Center (CDC) License after the part "...Client's copyright notice thereof..." the sentence "...only during the term of the Agreement and solely for the purpose of fulfilling their obligation in accordance with the Agreement;" has been added. Attachment A Section III: Confidentiality Agreement stands omitted. <p>Additional Terms: The following additional terms are herein incorporated as part of this Agreement:</p> <ol style="list-style-type: none"> Together the following documents are incorporated herein by reference and made part of this BlackBeltHelp Master License Services Agreement ("Agreement"): this Agreement including Contact Information, Agreement Details, Notes, Schedule A – BlackBeltHelp Master License and Service Agreement Terms and Conditions ("MLSA - Terms and Conditions") Schedule B - Client's Terms and Conditions, Schedule C - Statement of Work Summary (including the incorporated exhibits), Schedule D - BlackBeltHelp Reply to ITN-2023-055-TP (collectively referred to as the "Contract Documents"). In the event of any conflict between Schedule A- Master License and Service Agreement Terms and Conditions and Schedule B- Client's Terms and Conditions, Schedule B-Client's Terms and Conditions shall prevail. In the event of any conflict between Schedule A - MLSA - Terms and Conditions and Schedule C - Statement of Work Summary, the Schedule C - Statement of Work Summary shall prevail.
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BlackBeltHelp – Master License and Services Agreement

Schedule A - MASTER LICENSE AND SERVICE AGREEMENT TERMS AND CONDITIONS

To proceed, please click to view/print terms and conditions:

<https://signnow.com/s/edXbjv2>

NOTE: If the link above is not hyperlinked, download this document to get the hyperlink. You can download this agreement without signing it.

SCHEDULE B: CLIENT’S TERMS AND CONDITIONS

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CONTRACT DOCUMENTS

Together, the following documents are incorporated herein by reference and made part of this BlackBeltHelp Master License and Services Agreement (“Agreement”): this Agreement, including Contact Information, Agreement Details, Notes and Terms and Conditions; and all attachments included herein to this Agreement (collectively referred to as the “Contract Documents”). In the event of any conflict between the Terms and Conditions and the Agreement Details, the Agreement Details shall prevail.

By electronically signing the Contract Documents, your organization is entering into a legally binding contract with BlackBeltHelp, LLC. Please download and read carefully prior to signing. Contract Documents will be effective when signed by the parties’ authorized representatives.

ELECTRONIC SIGNATURE

I agree to the Master License and Services Agreement, including the Agreement Details, Notes, Terms and Conditions, and any Attachments and Schedules:

Client Authorized Signatory Signature:	
Organization Name:	
Signature Date:	

BlackBeltHelp Signature:	
BlackBeltHelp,	
Signature Date:	

BlackBeltHelp Signature:	
BlackBeltHelp,	
Signature Date:	

BlackBeltHelp Signature:	
BlackBeltHelp,	
Signature Date:	

BlackBeltHelp – Master License and Services Agreement Terms and Conditions

MASTER LICENSE AND SERVICES AGREEMENT**1. GENERAL**

- 1.1. BlackBeltHelp LLC provides artificial intelligence, and predictive analytics-powered higher education customer service and student success SaaS platform. BlackBeltHelp specializes in cloud-, multi-tenant-, self service- and artificial intelligence-based customer support solutions.
- 1.2. Services contracted with Client shall be specified in this Agreement or an applicable SOW.
- 1.3. Binding Agreement. In exchange for and in consideration of the mutual promises, premises, and covenants herein, and for other good and valuable legal consideration, the receipt and sufficiency of which are hereby acknowledged, BlackBeltHelp and Client hereby agree to be bound by this Agreement and the terms and conditions set forth herein.

2. DEFINITIONS

- 2.1. *Affiliate* means any company that controls, is controlled by, or is under common control with another company.
- 2.2. *Agreement* means this Master License and Services Agreement and all amendments, attachments, exhibits, schedules, or other modifications made by the parties from time to time.
- 2.3. *Assets* means Provider Assets, Joint Assets, Client Assets, and Re-Licensed Assets.
- 2.4. *Campus Consortium Foundation* is a non-profit Partner and higher education reseller of technology services, including BlackBeltHelp services; a provider of grants for IT projects and initiatives, iSeminars, and conferences led by peer institutions on technology trends and lessons learned; and an incubator of education technology startups providing funding and financial, talent acquisition, talent management, development, marketing legal, strategic management and planning and facilities services.
- 2.5. *Client* means the individual(s) or legal entity receiving Services under this Agreement. In the case of an entity, the term Client shall include the Affiliates of that entity.
- 2.6. *Client Data* means Client End User information and/or data that resides in a Provider or Partner database that does not include any Provider Asset.
- 2.7. *Client Asset* means Content developed solely by Client or by Client in collaboration with any third party which does not incorporate any Provider Asset that Client contributes to Provider or a Partner pursuant to Sections 3.1.2 and Attachment A, Section I.

- 2.8. *Client Application* means the licensed copies of the software application Client desires to have Provider, or a Partner perform Services upon in accordance with the applicable SOW.
- 2.9. *Content* means material developed, purchased, or otherwise made available; all computer software (including source code and object code versions); white papers; studies; wire and unified modeling language diagrams; project plans; video, music, screenplays, plots, story boards, scripts, and related documents; and Enhancements of the foregoing which relate to the Services.
- 2.10. *End User* means individual(s) authorized by Client to access or use any Provider Assets or to receive any of the Services.
- 2.11. *Enhancements* means modifications, adaptations, and derivative works.
- 2.12. *Hosting Services* means the provision of services and data storage space and application-level access offered by Provider or a Provider Partner to locate, store, manage, and maintain any Provider Asset or Client Application on servers operated and maintained by Provider or a Partner for use and access by Client and End Users affiliated with or subscribed through Client.
- 2.13. *Joint Asset* means Content jointly created by the parties and which does not include any Provider Asset or Client Asset
- 2.14. *OculusIT LLC* is a Partner providing IT hosting, monitoring, and managed and consulting Services.
- 2.15. *Partner* means technology partners through whom BlackBeltHelp provides cost-effective IT solutions and services in the following areas: identity and access management; cloud hosting; IT-managed services and monitoring; and service desk.
- 2.16. *Provider* means BlackBeltHelp LLC.
- 2.17. *Provider Asset* means all Content: (i) provided to Client by Provider or a Provider Partner; (ii) which is derived from, derivative of, or based in whole or in part upon any Content provided by Provider or Provider Partner; and (iii) developed during the Term which does not incorporate any Client Asset.
- 2.18. *QuickLaunch LLC* is a Partner providing cloud, multi-tenant, micro-services, self-service and artificial intelligence-based single sign-on, password management, identity management, and user provisioning and de-provisioning platform.
- 2.19. *Unified LLC* is a Partner providing university student information systems and enterprise resource planning

BlackBeltHelp – Master License and Services Agreement Terms and Conditions

systems cloud, multi-tenant, self-service-based enterprise mobile and portal, content management, student engagement, and college and university student information and enterprise resource planning system.

- 2.20. *Relicensed Asset* means Content which is owned by third parties and licensed to Provider or a Partner and re-licensed by Provider or such Partner to Client, or which is owned by third parties and licensed directly by said third parties to Client pursuant to a separate license agreement.
- 2.21. *Services* shall refer to the Services to be provided by Provider or a Partner as set forth in the applicable SOW.
- 2.22. *Service Level Agreement* shall refer to the level of service offered to Client for a particular service or product and sets forth the priorities, responsibilities, guarantees, and warranties of Provider or a Partner. All Service Level Agreements for access, storage, support, back-up, maintenance, upgrades, uptime, and/or bandwidth must be contained in the applicable SOW.
- 2.23. *Statement of Work or SOW* means a Services agreement between Client and Provider or a Partner, under which Provider or such Partner agrees to perform specified Services or provide certain Assets and licenses to Client. Each SOW, as and when executed, shall be fully incorporated into this Agreement as an attachment hereto.
- 2.24. *Third-Party Software* means all Content obtained by Client from any entity other than Provider or a Provider Partner, which Client uses, implements, or otherwise applies to the Services.

3. INTELLECTUAL PROPERTY RIGHTS

- 3.1. **License, Title, and Ownership of Assets.** Except with respect to the access granted herein, Client agrees that all right, title, and interest, including all rights under patent, trademark, and copyright law, in and to all Provider Assets, shall be owned by Provider or the applicable Partner. Provider and Partners grant to Client a limited, revocable, non-reproducible, and non-redistributable license to access, modify, and use the Provider Assets and Services in compliance with all other provisions, duties, and covenants contained in this Agreement. Client hereby agrees that it shall be bound by all license restrictions as set forth in this Agreement and in the terms and conditions links of any Provider or Partner application software.
- 3.1.1. Client (i) hereby grants to Provider and Partners a royalty-free, worldwide, perpetual, irrevocable, transferable, and unlimited license to access, use, modify, reproduce, distribute, create derivative works from, offer for sale, and sublicense any Client Asset; and (ii) represents

and warrants that it has the right to grant the license to the Client Asset set forth herein.

- 3.1.2. All right, title, and interest, including all rights under patent, trademark, and copyright law, in and to all Joint Assets shall be owned jointly by Provider and Client. Either Provider or Client shall have the right to use a Joint Asset for any purpose, including without limitation, to create Enhancements, grant sublicenses, distribute and otherwise exploit same, provided it does not interfere with the parties' rights under this Agreement. Each party shall maintain copyright notices on the Joint Asset indicating the joint authorship.
- 3.1.3. Client may not sublicense or resell any of Provider or Partner Services without the prior written approval of Provider.

4. CLIENT RESPONSIBILITIES

- 4.1. **Client Responsible for Equipment.** Unless otherwise specified in the applicable SOW, (i) Client shall be responsible at its sole expense for purchasing and supplying all computer equipment and hardware, system software, and peripheral equipment, as well as any maintenance, repair, and upgrades to the foregoing, necessary to access and operate any Assets made available to or required by Client. To the extent that Provider or a Partner is supplying any hardware to Client in connection with the Services, Provider or such Partner shall retain title of such hardware. To the extent that Provider or a Partner is providing Hosting Services for any hardware to Client in connection with the Services, Provider or such Partner shall retain title of such hardware and upon termination of this Agreement, the title of such hardware shall remain with Provider or such Partner.
- 4.2. **Protection of Data and Software.** Client has the sole responsibility for the preparation, entry, use, maintenance, and protection of any data and Content it uses in connection with all Assets. Provider or Partners shall have no duty or obligation to monitor Client's Content or any other Content provided or distributed by others. PROVIDER AND PARTNERS SHALL HAVE NO RESPONSIBILITY FOR THE PROTECTION OR LOSS OF ANY DATA OR OTHER CONTENT OWNED BY CLIENT OR THE CLIENT ASSET.
- 4.3. **Right to Access.** Client must procure the appropriate authorizations and rights from any and all third-parties to allow Provider and Partners to access Client's Applications and perform the Services as set forth in the applicable SOW. Client warrants and covenants that it has, and will maintain for the duration of the Agreement, affirmative rights from all relevant third parties to allow Provider and Partners to access Client's Applications and perform the Services as set forth in the applicable SOW.

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- 4.4. At its own expense, Client shall provide to Provider or Partner the information and materials necessary to implement the Services and shall provide it in the manner and format designated by Provider or Partner.
- 4.5. At its own expense, Client shall give the assistance needed to allow performance of the Services, including providing Provider or Partner with timely access to Client personnel (executive and staff), utilities, and information reasonably necessary to the performance of the Provider or Partner Services. The Client shall be responsible for the accuracy, reliability, and completeness of all information and data that the Client supplies to Provider or Partners for use hereunder.
- 4.6. Unless otherwise stated in the applicable SOW, Provider and Partners shall provide administrative access, as approved by Provider, to the Services seven (7) days per week, twenty-four (24) hours per day, provided that such access shall be limited solely to the individuals identified and authorized by Client, or such other individuals as Client may designate in writing to be added from time to time (“Client Representatives”).
- 4.7. Provider reserves the right, upon prior written notice to Client, to access Client’s Provider or Partner Services to audit such things as performance, usage, infrastructure, etc. The date and time of the audit shall be determined mutually and in writing between Provider and Client. The audit will not affect the availability of Client’s Services. Provider, while performing any such audit, shall not have access to personally identifiable End User information.

5. PROPRIETARY RIGHTS AND CONFIDENTIALITY

- 5.1. **Alteration of Proprietary Legends.** Client shall include and shall not alter or remove the copyright or any other proprietary notices or legends on all copies (in whatever form) of any Provider Asset, Joint Asset, or Re-Licensed Content. Neither party shall remove the copyright or other proprietary notices from the Joint Content.
- 5.2. **Non-Disclosure of Client’s Confidential Information.** Provider and Partners shall instruct their agents, employees, and consultants to treat Client’s non-public professional or business information, including data or information related to Client’s business, as confidential and not disclose such data or information to other parties except as is reasonably necessary in connection with furnishing a Provider Asset or Re-Licensed Asset to Client.
- 5.3. **Use of Provider Trademarks.** Provider hereby grants Client a non-exclusive right and license to use Provider’s trademarks, service marks, copyrights, or logos (**Provider Marks**) solely in connection with promotional materials related to Provider. Client shall submit each new form of such use of Provider Marks to

Provider for approval prior to Client’s first use of such new form, and Client shall promptly make any changes in such use on an ongoing basis as requested by Provider. Client acknowledges Provider’s claim that Provider owns all right, title, and interest in or to the Provider Marks and that Client may not display or distribute any Provider Marks in any way, except as provided herein or with the prior written permission of Provider. Client shall not knowingly take any action that could be detrimental to the goodwill associated with the Provider Marks or Provider.

- 5.4. **Marketing.** Throughout the Term of this Agreement, and subject to all applicable laws and Client policies, Client may promote Provider to its End Users in a manner consistent with its promotion of other services. In addition, Provider may collect data, undertake marketing tests and surveys, rating polls, and other research regarding the products and services offered by Provider and Provider products and services as promoted by Client. The terms and conditions, privacy policies, and end user license agreement for Provider software applications can be found at www.blackbelthelp.com.
- 5.5. Client grants Provider a non-exclusive right and license to use the Client name and trademark (**Client Marks**) solely in connection with promotional materials related to Client, provided all such uses of Client Marks shall conform to the guidelines for use of Client trademarks. Provider acknowledges that Client owns all right, title, and interest in or to the Client Marks and that Provider may not display or distribute Client Marks in any way, except as provided herein or with the prior written permission of Client. Provider shall not knowingly take any action that could be detrimental to the goodwill associated with the Client Marks or with Client.
- 5.6. **Survival.** Sections 1, 2, 3, 5, 7, 8, and 11 shall survive any termination or expiration of this Agreement. In addition, any payment obligations which exist as of the termination or expiration of this Agreement shall remain in effect, unless termination is for breach by Provider.

6. PROVIDER SERVICES AND FEES

- 6.1. **Services.** Provider shall provide Services to Client in accordance with the applicable SOW. Client may request changes to any SOW by notifying Provider in writing and specifying the nature of the changes (an **Addendum**). Upon agreement by Provider and Client of the terms of the modification, the parties will execute an Addendum. Authorized signatories from Provider and Client will be required to execute the Addendum for Services to continue and/or commence.
- 6.2. **Fees.** Client shall pay the fees set forth in the relevant SOW. Fees for licenses relate to Provider Assets and are not attributable to third-party licenses passed on to Client or Client’s End Users. The relevant license that

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governs any application, content, feature, or code within any Provider application is defined by the terms and conditions linked in the Provider application. All terms, provisions, and agreements set forth in such linked license terms and conditions within the Provider application(s) (except to the extent expressly modified herein) are hereby incorporated by reference with the same force and effect as though fully set forth herein.

- 6.2.1. **Terms for First-Time Fees.** Client shall pay all fees in US Dollars (USD) within thirty (30) days of receipt of invoice from Provider.
- 6.2.2. After the initial year, fees for each SOW shall be subject to a compounding annual percentage increase not to exceed the US Consumer Price Index (CPI) or 7%, whichever is greater. Fees are non-refundable. In the event of any dispute concerning the amount due on any invoice, Client shall pay such amount as is not disputed pending the resolution of the disputed amount.
- 6.2.3. **Fees Payable.** All checks are to be made payable to BlackBeltHelp, LLC and sent to 936 SW 1st Ave Suite 412 Miami, FL 33130.
- 6.2.4. **Terms for Recurring Annual Fees.** All recurring annual fee payments are due on the anniversary of the Effective Date of each applicable SOW.
- 6.3. **Client Responsible for Costs.** Unless otherwise specified in the applicable SOW, in addition to the fees, Client shall be responsible for all freight, handling, and insurance charges; and all applicable sales, property, and use taxes. Any applicable taxes and charges will be computed and added to the fees and are due and payable in accordance with Section 6.2 herein, is subsections, and the specific terms of the applicable SOW. Further, If Client is a tax-exempt entity, Client must submit proof or certification of its tax-exempt status at the time of execution of the Agreement or upon Provider's request.
- 6.4. **Late Payment Charge.** If Client fails to pay any amount due hereunder, Provider may, at its sole option, without incurring any obligation or liability to Client or any third party: (a) refuse to continue to provide Services and terminate access to the Provider Assets and Re-Licensed Content; (b) furnish Services, Provider Assets and Re-Licensed Content on a "COD" basis; or (c) terminate this Agreement upon written notice to Client. Provider shall be under no obligation to furnish any Services or provide access to the Provider Assets or Re-Licensed Content during any period within which Client does not perform any of its other obligations hereunder. In the event of non-payment, Client agrees to pay Provider's costs and expenses of collection, including all litigation costs, court costs and reasonable attorneys' fees. In addition, Client shall be liable to pay Provider late payment charges at the rate

of one and one-half percent (1½%) per month, partial month, or the maximum permitted by law, whichever is less, on the outstanding amount due. The remedies set forth in this paragraph are not exclusive and are cumulative and shall not preclude Provider from pursuing any other remedy available at law or in equity.

- 6.5. **Modification to Provider Asset(s).** At Provider's sole discretion, Provider may at any time modify Provider Assets without notification to Client.

7. INDEMNITY AND LIMITATION OF LIABILITY

- 7.1. **INDEMNIFICATION OF PROVIDER.** Client shall indemnify, defend, and hold Provider, its advisory committees, officers, employees, agents, affiliates, subsidiaries, successors and assigns, and Partners harmless from and against any and all claims, demands, actions, proceedings, judgments, settlements, liabilities, and costs, including reasonable attorneys' fees, and including claims of third parties, arising from or in connection with any claims that any Client Asset infringes the rights of any third parties. Additionally, Client shall also indemnify Provider and Partners, to the extent stated above, from any claims, demands, actions, proceedings, judgments, settlements, liabilities, and costs, including reasonable attorneys' fees for or in connection with the Services Provider or a Partner provides related to the Client Applications.
- 7.2. **THIRD-PARTY SOFTWARE & RE-LICENSED ASSET LIMITATION OF LIABILITY.** Provider shall not be liable to Client for any damage, defects, usage interruptions, vulnerabilities, and/or compliance issues with respect to any third-party software and/or Re-licensed Assets Client uses in conjunction with Provider's Services. This limitation does not and will not foreclose Client from following the protocol set forth herein in requesting Provider from assisting in diagnosing and/or fixing third-party software and/or Re-licensed Asset problems at the rate set forth in this agreement or any Attachment hereto.
- 7.3. **INDEMNIFICATION OF CLIENT.** Provider shall indemnify Client, its board of trustees, officers, employees, agents, affiliates, subsidiaries, successors, and assigns from and against any and all claims, damages, liabilities, costs, and expenses, including reasonable attorneys' and experts' fees, arising out of or in connection with any claims based upon violation or infringement of copyright or third-party intellectual property rights arising out of the content of the Provider Services or any Provider Asset, except for any such claims that are based on violations in connection with Re-Licensed Asset(s) which Provider does not own or control, provided that: (a) Client promptly notifies Provider in writing of any such claims, damages, liabilities, costs, or expenses; (b) Provider shall have sole control of the settlement and defense of any action

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to which this indemnity relates; (c) Client cooperates in every reasonable way to facilitate such defense; and (d) if Client becomes aware of any suspected infringement by a third party of any proprietary rights of Provider, Client shall promptly notify Provider of such activities.

- 7.4. **LIABILITY TO THIRD PARTIES BY PROVIDER.** IN NO EVENT WHATSOEVER SHALL PROVIDER BE LIABLE TO CLIENT OR TO THIRD PARTIES FOR ANY DAMAGES CAUSED, IN WHOLE OR IN PART, BY THE USE OF THE SERVICES OR THE PROVIDER ASSET OR FOR ANY LOST REVENUES, LOST PROFITS, LOST SAVING, OR OTHER DIRECT OR INDIRECT, INCIDENTAL, SPECIAL, OR CONSEQUENTIAL DAMAGES INCURRED BY ANY PERSON, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES OR CLAIMS. IN NO EVENT SHALL THE LIABILITY OF PROVIDER EXCEED THE TOTAL AMOUNT ACTUALLY PAID BY CLIENT TO THE PROVIDER FOR THE RELEVANT SOW IN THE TWELVE MONTHS IMMEDIATELY PRECEDING THE FACTS GIVING RISE TO THE CLAIM. IF ANY REMEDY HEREUNDER IS DETERMINED TO HAVE FAILED OF ITS ESSENTIAL PURPOSE, ALL LIMITATIONS OF LIABILITY, DISCLAIMERS, AND EXCLUSIONS OF WARRANTY AND DAMAGES SET FORTH HEREIN SHALL REMAIN IN EFFECT.

8. LIMITED WARRANTY AND EXCLUSIVE REMEDY

- 8.1. **Limited Warranty.** Provider warrants that it shall perform all services in a professional and workmanlike manner consistent with industry standards. Provider further warrants that any Provider Asset shall substantially conform to the specifications set forth in each SOW.
- 8.2. **Exclusive Remedy.** Client's exclusive remedy for defects in a Provider Asset shall be the repair or replacement of the Provider Asset, at the election of Provider.
- 8.3. Each party warrants, represents, and covenants to the other party that it: (i) has the power and authority to enter into this Agreement and to fully perform its obligations hereunder; and (ii) shall not knowingly use the rights granted to it hereunder for any unlawful purpose. To the best of each Party's knowledge, the enforcement and enjoyment by either Party of its rights and benefits hereunder do not and will not violate and are not and will not be subject to restraint or curtailment under the terms of any contract or agreement by which the other Party is bound.
- 8.4. PROVIDER MAKES NO WARRANTIES OR REPRESENTATIONS, EXPRESS OR IMPLIED, WITH RESPECT TO ANY ASSET PROVIDED OR MADE AVAILABLE TO CLIENT, OR WITH RESPECT TO ANY STANDARD ENDORSED BY

PROVIDER, INCLUDING WITHOUT LIMITATION ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, OR THAT ANY SERVICE OR ASSET DOES NOT INFRINGE THE PROPRIETARY RIGHTS OF THIRD PARTIES, INCLUDING PATENTS, COPYRIGHTS, AND TRADE SECRETS. ALL ASSETS AND SERVICES ARE PROVIDED "AS IS."

9. TERM AND TERMINATION

9.1.1. **Initial Term.** This Agreement shall continue for an initial term of five (5) years beginning on the Effective Date (**Term**), unless earlier terminated. Each SOW shall separately state its own Term.

9.1.2. This Agreement shall automatically renew for additional five- (5) year terms (**Renewal Term**) unless Client notifies Provider of its election not to renew in writing at least ninety (90) days prior to the expiration of the Term or any Renewal Term (if applicable). Each SOW shall renew according to its own terms.

9.2. **Termination.** This Agreement shall terminate as follows:

9.2.1. At the end of the then-current Term or Renewal Term, on the election of either party, communicated in writing as set forth in Section 9.1.2;

9.2.2. Provider may terminate this Agreement immediately in the event Client fails to pay any fees when due;

9.2.3. In the event either party commits a material breach of a term or condition of this Agreement, including but not limited a material breach of the Attachment A, Section III – the Confidentiality Agreement, said party has a commercially reasonable time to cure said breach; in the event that a breach cannot be completely cured within a time period set forth in this section or another section herein, said party is not in breach provided that curing the default begins within the time prescribed under this or any other section; for purposes of this section, beginning to cure a breach includes, but is not limited to, phone calls, responses to the other party that address the issue, contacting a third-party to diagnose or fix an issue, the creation of an internal ticket or order to resolve the breach.

9.2.4. In the event either party becomes insolvent or otherwise becomes unable to pay its debts when due, makes an assignment for the benefit of its creditors, or declares bankruptcy;

9.2.5. Provider shall have the right, upon sixty (60)

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days prior written notice, to dissolve Provider.

10. Rights upon Termination.

10.1. In the event that this Agreement is terminated by Client under sections 9.2.1 and 9.2.4, where Client becomes insolvent, or by Provider under sections 9.2.1, 9.2.2, 9.2.3, where Client commits a material breach, or by Client without due cause, within thirty (30) days of termination of this Agreement: (i) Client shall be responsible for paying applicable fees for the remainder of the Term; (ii) Provider shall terminate Client's access to the Services and use of the Provider Assets, applicable Re-Licensed Assets and licenses; and (iii) Client shall return the Provider Assets and Provider confidential information, and certify in writing that it has not retained any copies thereof.

10.2. In the event that this Agreement is terminated by Provider under sections 9.2.4 and 9.2.5; or by Client under 9.1.1, Provider shall terminate the Services and Client's access to any applicable Provider Asset and Re-Licensed Asset; and, at Client's written request, shall copy, to a transportable file media storage device, any Client Data that Provider may have in a Provider database as of the time of termination, and provide same to Client within 90 days of such request. Provider shall have no obligation to retain Client data beyond 90 days from termination of the Agreement for any cause.

10.3. **Termination Charges.** In the event that Provider provides a discount to any of the Services to be provided to Client pursuant to a SOW, and in the event that the Agreement is terminated by Client under section 9.2.1 or 9.2.4, where Client becomes insolvent, or by Provider under sections 9.2.1, 9.2.2, 9.2.3, where Client commits a material breach, or by Client without due cause, any discount of fees provided to Client within the prior three (3) years shall be reversed and Client shall pay the value of such discounts to Provider within thirty (30) days of such termination.

11. MISCELLANEOUS

11.1. **Force Majeure.** Neither Party will be liable for any failure or delay in performing an obligation under this Agreement that is due to any of the following causes (**Force Majeure**), to the extent beyond its reasonable control: acts of God, accident, riots, war, terrorist act, epidemic, pandemic, quarantine, civil commotion, breakdown of communication facilities, breakdown of web host, breakdown of internet service provider, natural catastrophes, governmental acts or omissions, changes in laws or regulations, national strikes, fire, explosion, or generalized lack of availability of raw materials or energy.

For the avoidance of doubt, Force Majeure shall not include (a) financial distress nor the inability of either party to make a profit or avoid a financial loss, (b) changes in market prices or conditions, or (c) a party's

financial inability to perform its obligations hereunder.

11.2. **Governing Law.** This Agreement and its interpretation shall be governed by and construed in accordance with the laws of New Jersey, without regard to its conflict of laws provisions. Each of the Parties hereto consents to the sole and exclusive jurisdiction of any state or federal court located within New Jersey.

11.3. **Compliance with Laws.** Provider represents that it will comply with all municipal, state, and federal laws, rules, and regulations applicable to the performance of its obligations under this Agreement.

11.4. **No Waiver.** The failure to enforce any breach of any covenant or condition of this Agreement by either party shall not constitute a waiver of said covenant or condition and shall not hinder or otherwise prevent the subsequent enforcement of said covenant or condition.

11.5. **Binding Agreement.** This Agreement shall be binding upon and inure to the benefit of the parties and their respective successors and assigns, but neither party shall have the right to assign or otherwise transfer its rights under this Agreement without the express, written consent of the other. Any attempt to assign the benefits or obligations of this Agreement without such consent shall be null and void. Notwithstanding the provisions of this paragraph, Provider may, without consent, assign this Agreement to an Affiliate or to its successor in the event of a sale of all or substantially all its assets.

11.6. **Severable Provisions.** If any of the provisions in this Agreement shall for any reason be declared or held invalid, illegal, or unenforceable, this shall not affect any other provision and the Agreement shall be construed as if such provision had never been contained herein.

11.7. **Notices.** Notices under this Agreement shall be in writing and shall, for all purposes, be sent by US registered or certified mail, return receipt requested, postage prepaid, properly addressed to the parties at the addresses set forth below, or at such other address for either party as may be specified by such party for purposes of this Agreement:

BlackBeltHelp, LLC
936 SW 1st Avenue, Suite 412,
Miami, FL 33130

Client Legal Notices Address and point of contact as per relevant SOW.

11.8. **Entire Agreement.** This Agreement, including all attachments hereto, constitutes the entire agreement between the parties and supersedes all previous letters, understandings, or verbal agreements which relate to the Services. No modification of this Agreement shall be binding on the parties unless such modification is in

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writing and duly signed by each party.

11.9. Client will not permit any third party to access the Assets or Services under this Agreement without prior written authorization from Provider.

11.10. **Partner Contracting.** This Agreement expressly authorizes the utilization by Provider of Partners and Partner resources in the provision of Services to Client. As between Partner and Provider, Provider is fully responsible to Client for the delivery of contract obligations and liable to Client per the terms of the Agreement.

Client and Partner(s) may contract separately under this Agreement, without participation of Provider, but in such case, Partner(s) assumes Provider's obligations and liabilities under this Agreement only with respect to such separate, ex-parte sub agreement.

11.11. **Non-Solicitation of Employees.** During the term of this Agreement and for a period of two (2) years after its termination, Client shall not solicit for hire or hire as an employee, consultant, or otherwise any of Provider's personnel who have performed any of the Services hereunder without Provider's written consent.

11.12. **Construction/Joint Drafting.** This Agreement is a negotiated document and shall be deemed to have been drafted jointly by the parties.

11.13. **Incorporation by Reference.** The SOW(s) attached hereto and any additional SOW(s) or amendment(s) to this Agreement, properly executed between the parties hereto as specified herein, are hereby incorporated by reference. A clear reference to this Agreement by its name and effective date shall be sufficient for such SOW, amendment, or other document to be governed by the terms of this Agreement and to be incorporated herein by reference.

11.14. **Personally Identifiable Information.** Neither party shall be required to provide any personally identifiable information regarding specific users which could violate any privacy or other legal rights of users or third parties, including but not limited to the Family Educational Rights and Privacy Act (FERPA).

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ATTACHMENT A
SECTION I: COMMUNITY DEVELOPMENT CENTER (CDC) LICENSE

This CDC License (“License”) is entered into by and between BlackBeltHelp and Client.

WHEREAS, BlackBeltHelp and Client have entered into a Master License and Services Agreement (“MLSA”) dated the same date as this License; and,

WHEREAS, the Client wishes to License certain content provided by Provider which is derived from, derivative of, or based in whole or in part upon any proprietary computer software/programming provided by Provider;

Now therefore, in exchange for and in consideration of the mutual promises, premises, and covenants herein, and for other good and valuable legal consideration, the receipt and sufficiency of which are hereby acknowledged, by execution of the MLSA, Provider and Client hereby agree to be bound by this Agreement and the terms and conditions set forth herein.

1. Definitions:

1.1. Definitions. All capitalized terms not otherwise defined herein shall have the meaning set forth in the MLSA.

2. License and Intellectual Property:

2.1. Grant of License in Provider Asset. In consideration of Client’s compliance with the terms and conditions set forth herein, Provider hereby grants to Client, and Client hereby accepts, a non-exclusive license to use the Provider Asset for the Term of the MLSA. Client may create Enhancements to the Provider Asset for its internal use only and in connection with the Services. Client shall be permitted to upload, download, use and exchange Enhancements created by Client or by other Clients of the Provider Asset. Client shall also be permitted to share the source code associated with Enhancements, collaborate on the development of Enhancements, and otherwise share ideas regarding the Provider Asset with other Clients of the Provider Asset. Client also agrees to upload all Enhancements created by Client to the CDC within thirty (30) days of production release by Client. Client shall not disclose or distribute to any third party any of the Assets except through the CDC.

2.2. Grant of License in Client Asset. Client hereby (i) agrees to upload to the CDC all Client Assets created by Client within thirty (30) days of production release by Client of the Client Asset; (ii) grants an irrevocable, perpetual and unlimited license to Provider to access, use, and modify any Client Asset created by Client, subject to the requirement to maintain Client’s copyright notice thereof; and (iii) shall not disclose or distribute to any third party or any Client, except through the CDC, Client Asset.

2.3. Restricted Use of Provider Asset. Client shall not (i) transfer, lease, license, sublicense, sell, assign or otherwise dispose of the Provider Asset or any Enhancements; (ii) other than in connection with Client’s use of the Provider asset as permitted by this License for its internal use, adapt, modify, decompile, disassemble, reverse engineer the Provider Asset, or translate or create any derivative works based on the Provider Asset; and (iii) make any copies of the Provider Asset.

3. Termination:

3.1. Term. This Agreement shall continue in force and effect for so long as the MLSA is in effect and not terminated. Upon termination of the MLSA, Client’s CDC license granted hereunder shall terminate.

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ATTACHMENT A
SECTION II: LICENSE OF RE-LICENSED ASSET

This License of Re-Licensed Asset (“License”) is entered into by and between BlackBeltHelp and Client.

WHEREAS, BlackBeltHelp and Client have entered into a Master License and Services Agreement (“MLSA”) dated the same date as this License; and,

WHEREAS, the Client wishes to License certain content provided by Provider which is derived from, derivative of, or based in whole or in part upon any proprietary computer software/programming provided by Provider;

Now therefore, in exchange for and in consideration of the mutual promises, premises, and covenants herein, and for other good and valuable legal consideration, the receipt and sufficiency of which are hereby acknowledged, by execution of the MLSA, Provider and Client hereby agree to be bound by this Agreement and the terms and conditions set forth herein.

1. Definitions:

1.1. Definitions. All capitalized terms not otherwise defined herein shall have the meaning set forth in the MLSA.

2. License and Intellectual Property:

2.1. Grant of License in Re-Licensed Asset. In consideration of Client’s compliance with the terms and conditions set forth herein, Client shall be entitled to access and use the Re-Licensed Asset for the term of the MLSA, as set forth in the SOW and subject to any third-party licenses as shall be specified by Provider in the SOW.

2.2. Restricted Use of Provider Asset. Client shall not (i) transfer, lease, license, sublicense, sell, assign or otherwise dispose of the Re-Licensed Asset; (ii) adapt, modify, decompile, disassemble, reverse engineer the Re-Licensed Asset, or translate or create any derivative works based on the Re-Licensed Asset; and (iii) make any copies of the Re-Licensed Asset.

3. Termination:

3.1. Term. This Agreement shall continue in force and effect for so long as the MLSA is in effect and not terminated. Upon termination of the MLSA, this License and all licenses granted hereunder shall terminate.

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ATTACHMENT A
SECTION III: CONFIDENTIALITY AGREEMENT

This CONFIDENTIALITY AGREEMENT (the "Agreement") is entered into by and between BlackBeltHelp and Client.

WHEREAS, Recipient has requested information from Disclosing Party in connection with consideration of a possible transaction or relationship between Recipient and Disclosing Party.

WHEREAS, in the course of consideration of the possible transaction or relationship, Disclosing Party may disclose to Recipient confidential, important, and/or proprietary trade secret information concerning Disclosing Party and his/its activities.

THEREFORE, the parties agree to enter into a confidential relationship with respect to the disclosure by Disclosing Party to Recipient of certain information.

- 1. Definitions.** For purposes of this Agreement, "Confidential Information" shall include all information or material that has or could have commercial value or other utility in the business or prospective business of Disclosing Party. Confidential Information also includes all information of which unauthorized disclosure could be detrimental to the interests of Disclosing Party whether or not such information is identified as Confidential Information by Disclosing Party. By example and without limitation, Confidential Information includes, but is not limited to, the following: plans, software, clients, marketing plans, network login and passwords, business plans, financial information, and other information disclosed or submitted, orally, in writing, or by any other media, to Recipient by Owner. For purposes of this Agreement, the term "Recipient" shall include Recipient, the company he or she represents, and all affiliates, subsidiaries, and related companies of Recipient. For purposes of this Agreement, the term "Representative" shall include Recipient's directors, officers, employees, and financial, legal, and other advisors.
- 2. Exclusions.** Confidential Information does not include information that Recipient can demonstrate: (a) was in Recipient's possession prior to its being furnished to Recipient under the terms of this Agreement, provided the source of that information was not known by Recipient to be bound by a confidentiality agreement with or other continual, legal or fiduciary obligation of confidentiality to Disclosing Party; (b) is now, or hereafter becomes, through no act or failure to act on the part of Recipient, generally known to the public; (c) is rightfully obtained by Recipient from a third party, without breach of any obligation to Disclosing Party; or (d) is independently developed by Recipient without use of or reference to the Confidential Information.
- 3. Confidentiality.** Recipient and its Representatives shall not disclose any of the Confidential Information in any manner whatsoever, except as provided in paragraphs 4 and 5 of this Agreement and shall hold and maintain the Confidential Information in strictest confidence. Recipient hereby agrees, to the extent not prohibited by applicable state law, to indemnify Disclosing Party against all losses, damages, claims, expenses, attorneys' fees and costs incurred or suffered by Disclosing Party as a result of a breach of this Agreement by Recipient or its Representatives.
- 4. Permitted Disclosures.** Subject to applicable disclosure laws including the Public Records Act, Recipient may disclose Disclosing Party's Confidential Information to Recipient's responsible Representatives with a bona fide need to know such Confidential Information, but only to the extent necessary to evaluate or carry out a proposed transaction or relationship with Disclosing Party and only if such employees are advised of the confidential nature of such Confidential Information and the terms of this Agreement and are bound by a written agreement or by a legally enforceable code of professional responsibility to protect the confidentiality of such Confidential Information. Notwithstanding the foregoing, should Recipient receive a request to disclose Disclosing Party records by virtue of a Public Records request, Recipient agrees to notify Disclosing Party in writing of the request, provide BlackBeltHelp, LLC with a list of documents it has in its possession, allow Disclosing Party a reasonable time to object to the disclosure of any documents and/or procure a Court order directing Recipient not to disclose any of documents that fall within the exemptions of Recipient's applicable Public Records Act.
- 5. Required Disclosures.** If Recipient provides Disclosing Party a reasonable opportunity to review a compelled disclosure before it is made and to interpose its own objection, Recipient may disclose Disclosing Party's Confidential Information if and to the extent that such disclosure is required by court order or similar legal process.
- 6. Use.** Recipient and its Representatives shall use the Confidential Information solely for the purpose of evaluating a possible transaction or relationship with Disclosing Party and shall not in any way use the Confidential Information to the detriment of Disclosing Party. Nothing in this Agreement shall be construed as granting any rights to Recipient, by license or otherwise, to any of Disclosing Party's Confidential Information.
- 7. Return of Documents.** If Recipient does not proceed with the possible transaction with Disclosing Party, Recipient shall notify Disclosing Party of that decision and shall, at that time or at any time upon the request of Disclosing Party for any reason,

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return to Disclosing Party any and all records, notes, and other written, printed or other tangible materials in its possession pertaining to the Confidential Information immediately on the written request of Disclosing Party. The returning of materials shall not relieve Recipient from compliance with other terms and conditions of this Agreement.

8. Non-solicitation. Recipient hereby agrees to not directly solicit, engage, contract with, bid on, or perform any services for any Disclosing Party employee, customer, and/or contractor for a period of Twelve (12) Months after such disclosure.

9. No Additional Agreements. Neither the holding of discussions nor the exchange of material or information shall be construed as an obligation of Disclosing Party to enter into any other agreement with Recipient or prohibit Disclosing Party from providing the same or similar information to other parties and entering into agreements with other parties. Disclosing Party reserves the right, in its sole discretion, to reject any and all proposals made by Recipient or its Representatives with regard to a transaction between Recipient and Disclosing Party and to terminate discussions and negotiations with Recipient at any time. Additional agreements of the parties, if any, shall be in writing signed by Disclosing Party and Recipient.

10. Irreparable Harm. Recipient understands and acknowledges that any disclosure or misappropriation of any of the Confidential Information in violation of this Agreement may cause Disclosing Party irreparable harm, the amount of which may be difficult to ascertain, and therefore agrees that Disclosing Party shall have the right to apply to a court of competent jurisdiction for specific performance and/or an order restraining and enjoining any such further disclosure or breach and for such other relief as Disclosing Party shall deem appropriate. Such right of Disclosing Party is to be in addition to the remedies otherwise available to Disclosing Party at law or in equity. Recipient expressly waives the defense that a remedy in damages will be adequate and any requirement in an action for specific performance or injunction for the posting of a bond by Disclosing Party.

11. Survival. This Confidentiality Agreement shall survive the termination of any associated agreement and the confidentiality provisions shall survive so long as the relevant information retains its confidential character.

1. Incorporation by Reference. The District Board of Trustees of Broward College, Florida (“Client”) and the BlackBeltHelp, LLC. (“Provider”) hereby incorporate this Supplemental Addendum - General (“Addendum”) into the Master License and Service Agreement between Client and Provider (the “Agreement”). If this Addendum conflicts with the Agreement’s terms, this Addendum shall control.

2. Payment. Provider shall submit bills for compensation for goods, services and/or expenses in detail sufficient for a pre-and post-audit. A copy of all invoices (including an itemization of the date, hours expended, and description of the deliverable) shall be sent to the attention of

_____.
Invoices may be submitted via email, facsimile or U.S. mail. The time at which payment will be due from the Client will be in accordance with Schedule C – Statement of Work Summary, which shall be thirty (30) days from the date of an undisputed invoice, and the invoicing will be done on an advance quarterly basis. In lieu of all provisions in the Agreement pertaining to penalties for late payment, if Client does not issue payment within approximately thirty days of receipt of a proper invoice, Client shall pay Provider an interest penalty from the date the invoice was due until it was paid at the rate established pursuant to Section 55.03(1), Florida Statutes, if the interest exceeds one dollar. If the term of the Agreement is beyond the current fiscal year for the State of Florida, Client’s performance and obligation to pay under this Agreement is contingent upon an annual appropriation by the Legislature. Client is immune and/or exempt from the payment of taxes and shall not be responsible for the payment thereof. Client shall provide an appropriate exemption certificate.

3. Termination for Convenience. The Client may terminate this Agreement with or without cause at any time for convenience upon 90 calendar days prior written notice to the Provider. In the event of termination for convenience, the Client shall compensate the Provider for all authorized and accepted deliverables and/or services completed through the date of termination in accordance with Schedule C - Statement of Work Summary. The Client shall be relieved of any and all future obligations hereunder, including but not limited to lost profits and consequential damages, under this Agreement. The Client may withhold only the last month's payment to the Provider for such work until such time as the Client determines the exact amount due to the Provider.

4. Indemnification. For value received, the Provider shall indemnify and hold the Client, its officers, directors, board of trustees, agents, assigns, and employees harmless from liabilities, damages, losses and costs, including, but not limited to reasonable attorneys’ fees, to the extent caused by the negligence, recklessness or intentionally wrongful conduct of the Provider and other persons employed or utilized by the Provider in the performance of the Agreement. The Provider further acknowledges that it is solely responsible for ensuring its compliance and the compliance of its subcontractors, suppliers, agents, assigns, invitees, and employees with the terms of this Agreement. This paragraph shall survive the expiration or termination of this Agreement.

5. Relationship of the Parties. Each of the parties is an independent contractor and nothing in the Agreement shall designate any of the employees or agents of one party as employees or agents of the other. Further, Provider expressly understands and agrees that Provider, its officers, agents, and employees, are not entitled to any employment benefits from the Client.

6. Public Records Law. Client is subject to the public records laws of Florida, including records retention requirements, and any provisions in the Agreement pertaining to confidentiality obligations on the part of Client are hereby deleted and shall be of no force and effect. Provider shall allow public access to all project documents and materials in accordance with the provisions of Chapter 119, Florida Statutes. Should Provider assert any exemptions to the requirements of Chapter 119 and related statutes, the burden of establishing such exemption, by way of injunctive or other relief as provided by law, shall be upon Provider and Provider shall bear all costs and fees related to the same.

If Provider meets the definition of “contractor” under Section 119.0701, Florida Statutes, in addition to other Agreement requirements provided by law, Provider must comply with public records laws, and shall:

- (a) Keep and maintain public records required by Client to perform the service.
- (b) Upon request from Client, provide Client with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law.

(c) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement term and following completion of the Agreement if Provider does not transfer the records to Client.

(d) Upon completion of the Agreement, transfer, at no cost, to Client all public records in possession of Provider or keep and maintain public records required by Client to perform the service. If Provider transfers all public records to Client upon completion of the Agreement, Provider shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Provider keeps and maintains public records upon completion of the Agreement, Provider shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to Client, upon request from Client’s custodian of public records, in a format that is compatible with the information technology systems of Client.

(e) IF PROVIDER HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO PROVIDER’S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT CLIENT AT (954)201-7639, LEGALSERVICES@BROWARD.EDU, OR 111 EAST LAS OLAS BOULEVARD, #523, FORT LAUDERDALE, FL 33301.

IN ADDITION, PROVIDER ACKNOWLEDGES THAT THE CLIENT CANNOT AND WILL NOT PROVIDE LEGAL ADVICE OR BUSINESS ADVICE TO PROVIDER WITH RESPECT TO ITS OBLIGATIONS PURSUANT TO THIS SECTION RELATED TO PUBLIC RECORDS. PROVIDER FURTHER ACKNOWLEDGES THAT IT WILL NOT RELY ON CLIENT OR ITS COUNSEL TO PROVIDE SUCH BUSINESS OR LEGAL ADVICE, AND THAT PROVIDER IS HEREBY ADVISED TO SEEK BUSINESS/LEGAL ADVICE WITH REGARD TO PUBLIC RECORDS MATTERS ADDRESSED BY THIS AGREEMENT. PROVIDER ACKNOWLEDGES THAT ITS FAILURE TO COMPLY WITH FLORIDA LAW AND THIS AGREEMENT WITH RESPECT TO PUBLIC RECORDS SHALL CONSTITUTE A MATERIAL BREACH OF THIS AGREEMENT AND BE GROUNDS FOR TERMINATION.

7. Sovereign Immunity. Nothing in the Agreement shall act, or be construed to increase or alter Client’s liability for tort claims beyond the waiver of sovereign immunity limits set forth in Section 768.28, Florida Statutes.

8. Compliance. In its performance, Provider shall, at its own expense, at all times in the term, do the following:

- a. Permits: have all applicable permits, licenses, consents, and approvals necessary;
- b. General: comply with all applicable federal, state, local and rules, regulations, and ordinances and all other governmental requirements; and
- c. Privacy: comply with all applicable state and federal laws and Client policies and procedures governing the use and/or safe-keeping of confidential, highly sensitive, and/or personally identifiable or protected health information (as may be defined by state or federal law), including, but not limited to, the Family Educational Rights and Privacy Act (FERPA), the Health Insurance Portability and Accountability Act (HIPAA), the Gramm-Leach Bliley Act, and the Federal Trade Commission’s Red Flags Rule (which implements Section 114 of the Fair and Accurate Credit Transactions Act of 2003). In the event that Client will share with or provide access to Provider of any protected health information (“PHI”), as may be defined by state or federal law, Client and Provider will enter into a separate agreement which will govern the use of the PHI. Provider agrees to include all such terms and conditions contained in any subcontractor or agency contracts providing services on behalf of Provider.

9. E-Verify. If the Provider meets the definition of “contractor” under Section 448.095, Florida Statutes, in addition to other contract requirements provided by law, the Provider shall register with and use the E-Verify system operated by the United States Department of Homeland Security to verify the work authorization status of all its employees hired during the term of this Agreement. The Provider shall also require all subcontractors performing work under this Agreement to use the E-Verify system for any employees they may hire during the term of this Agreement. The Provider must provide evidence of compliance to the College as required under Section 448.095, Florida Statutes. Failure to comply with this provision is a material breach of the Agreement, and the College may terminate the Agreement at its sole discretion without liability. The Provider shall be liable for all costs incurred by the College resulting from the Provider’s noncompliance with the requirements of this section.

10. General Provisions.

- a. State of Florida Public Entity Contracting Prohibitions. Provider represents, warrants and covenants that it is not currently and, throughout the term of this Agreement shall not be, ineligible for the award or continuation of this Agreement under

Sections 287.133, 287.134 and 287.135, Florida Statutes. Provider understands and accepts that this Agreement may be void, voidable or subject to immediate termination by Client if the representation, warranty and covenant set forth above is violated. Client, in the event of such termination, shall not incur any liability to Provider for any work or materials furnished.

b. Warranties. Intentionally Omitted.

c. Marketing. No party shall, except with prior written consent of the other party on each occasion, make any press or media announcements concerning the Agreement or use the name, logos, or trademarks of any other party, or any version, abbreviation, or representation of them, in any advertising or other form of publicity or fundraising without the written permission of the party whose name, logo, or trademark is sought for use.

d. Insurance. Client, as a public body corporate entity, warrants and represents that it is self-funded for liability insurance, with said protection being applicable to officers and employees, while acting within the scope of their employment by or service to Client. Any provision requiring Client to provide or acquire insurance coverage other than such self-insurance shall not be effective. Provider shall have and maintain the types and amounts of insurance as specified in Schedule D – Reply to ITIN-2023-055-TP and at a minimum, will cover Provider’s (or subcontractor’s) exposure in performing the Agreement and at Client’s request, name Client as additional insured on Provider’s policies. All policies shall be in a form and with deductible limits satisfactory to Client, with insurance companies reasonably approved by Client and authorized to do business in the State of Florida, and written as primary coverage (except for professional liability). Certificates of insurance shall be provided to Client upon request and timely renewals of such insurance shall be provided to Client. All insurance policies and certificates shall contain a provision that it will not be cancelled without giving Client thirty (30) days’ written notice prior to the effective date of cancellation. Provider, for and on behalf of itself and each of its insurers, hereby waives any and all rights of subrogation against Client for any loss or damage arising from any cause covered by any insurance required to be carried under the Agreement by any other insurance actually carried by Provider. Provider shall provide copies of any insurance policies upon request.

e. Third Parties. Client is not liable for the acts of third parties or the consequences of the acts of third parties. There shall be no third party beneficiaries to the Agreement.

f. Governing Law. The Agreement is governed by the laws of the State of Florida, without regards to its conflicts of law principles. Exclusive venue of any actions shall be in Broward County, Florida. Client is entitled to the benefits of sovereign immunity.

g. Travel Expenses. If Client is responsible for reimbursing Provider for travel expenses pursuant to the Agreement, bills shall be subject to, and shall be submitted by Provider in accordance with, § 112.061, F.S. and Client policies and procedures. Client reserves the right not to pay travel expenses unless Client approves such expenses in advance, in writing.

h. Conflicts. Provider represents that it is aware of the requirements of Chapter 112, Florida Statutes and in compliance with the requirements thereof, and other laws and regulations concerning conflicts of interests in dealing with entities of the State of Florida. Provider certifies that its directors and/or principal officers are not employed and/or affiliated with Client unless a current Conflict of Interest (Report of Outside Activity/Employment) form has been completed, executed by such director or officer and approved in accordance with applicable Client policies or rules. Violation of this section shall be grounds for termination of the Agreement.

i. Records. Provider agrees to keep and maintain, separate and independent records pertinent to the performance of the Agreement, in accordance with generally accepted accounting principles. Client or its authorized agent shall through an independent auditor have the right to audit and inspect such records from time to time during the term of the Agreement, upon notice of 60 (sixty) days to Provider.

j. Deletion. Any term and/or condition in the Agreement on the following subject matters are hereby deleted in their entirety and declared null and void: (a) grants of exclusivity by Client to Provider; (b) restrictions on the hiring of Provider’s employees in case of solicitation through general, non-targeted advertisements of employment opportunities; (c) Client’s responsibility to pay intangible taxes, property taxes, or sales taxes; (d) automatic renewals of the term of the Agreement; (e) limitations of time to bring suit or claims; (f) granting Provider any right to audit Client; (g) Attorneys’ or collection fees provisions; (h) arbitration and mediation clauses; and (i) indemnification of Provider by Client.

k. Assignment. Provider shall not assign, transfer, delegate, subcontract, or otherwise dispose of, whether voluntarily, involuntarily, or by operation of law, any right or obligation under the Agreement without the prior written consent of Client, not to be unreasonably withheld. Any such unapproved assignment, subcontract or transfer is void. No subcontract or delegation shall in any event relieve Provider of any obligation or liability under the Agreement.

By signing below, Provider’s authorized representative agrees to incorporate this Addendum into the Agreement, and hereby executes this Addendum as of the date set forth below.

PROVIDER: [Click or tap here to enter text.](#)

By: _____

Name: _____

Title: _____

Date: _____

BlackBeltHelp – Statement of Work Summary

BLACKBELTHELP STATEMENT OF WORK SUMMARY**STATEMENT OF WORK CONTACT INFORMATION****Client**

Client Name

The District Board of Trustees of Broward College, Florida
--

Client Contacts

Primary Point of Contact

Name:	Torey Brignolo
Title:	Senior Director, Contact Center Operations
Email:	tbrignol@broward.edu
Phone:	(954) 201-7350

Authorized Signatory Point of Contact

Name:	Torey Brignolo
Title:	Senior Director, Contact Center Operations
Email:	tbrignol@broward.edu
Phone:	(954) 201-7350

STATEMENT OF WORK DETAILS

MLSA Agreement Name to which this SOW is a Schedule:	BlackBeltHelp Master License and Services Agreement
Schedule Number of this SOW:	BBH 0001

Effective/Start Date:	08/30/2024
End Date:	08/29/2027
Initial Term:	3 years beginning from the Effective Date
Renewal Term(s):	Three (3), one (1) year renewal options after the Initial Term.
Recurring Fees Billing Cycle:	Quarterly

BlackBeltHelp – Statement of Work Summary

Summary of Payment Schedule:

	Year 1	Year 2	Year 3	Year 4	Year 5
Annual % Increase Amount	N/A	N/A	N/A	N/A	N/A
Fees Due (\$ USD)	\$916,723.97	\$916,723.97	\$916,723.97	N/A	N/A

NOTE: Fees **include** an Annual Percent Increase Amount as listed above.

Annual Percent Increase Reference in MLSA:	N/A
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Payment Method:	ACH/Wire
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Payment Terms for Initial/First Year Fees:	Refer to Notes
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Payment Terms for Recurring Fees:	Refer to Notes
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Notes:

Exhibit A: Statement of Work Standard Terms are amended to read as follows:

- In Section 2 the part "Fee for reoccurring years are due on the anniversary date of applicable SOW." stands omitted.
- In Section 4(a) at the end of sentence the following proviso has been added:
"only upon Client's prior written approval of the expenses."
- In Section 5 any agreed proposed changes need to be signed in writing as an addendum to applicable SOW between the parties.
- In Section 6 the following part stands omitted:
"The SOW shall renew for identical, successive Term(s) ("Renewal Term") as listed in the "Renewal Term(s)" in the Statement of Work Details, unless Client notifies Company in writing, at least ninety (90) days prior to expiration of the operative Initial, or any renewal Term of a Renewal Agreement, of its election to not renew."
- In Section 7(b) the word "full" has been replaced with "reasonable".
- In Section 7(c) the part "...Client agrees to pay Company for such increased costs" stands omitted.

Additional Term(s).

- Payment Terms: Invoicing will be made on advance quarterly basis, due in Net 30 days from the date of invoice as per the below Payment Schedule:

	QTR 1	QTR 2	QTR 3	QTR 4	Total
Term 1	\$366,689.59	\$183,344.79	\$183,344.79	\$183,344.79	\$916,723.97
Term 2	\$229,180.99	\$229,180.99	\$229,180.99	\$229,180.99	\$916,723.97
Term 3	\$229,180.99	\$229,180.99	\$229,180.99	\$229,180.99	\$916,723.97
Term 4*	\$238,348.23	\$238,348.23	\$238,348.23	\$238,348.23	\$953,392.93
Term 5*	\$247,882.16	\$247,882.16	\$247,882.16	\$247,882.16	\$991,528.65
Term 6*	\$257,797.45	\$257,797.45	\$257,797.45	\$257,797.45	\$1,031,189.79

*Year 4 to 6 are optional term for recurring fee.

- Notwithstanding anything written in 'Statement of Work Electronic Signature' the following documents are incorporated herein by reference and made part of this BlackBeltHelp Statement of Work Summary ("SOW Summary"): this Statement of Work Summary, including the Statement of Work Details, Notes, Exhibit A: SOW Standard Terms, Exhibit B - Financial Summary, and Exhibit C – Assumptions and any applicable Attachments.
- The Exhibit A: Statement of Work Standard Terms hyperlink and related language stands omitted and replaced with the actual terms following the scope and assumptions page.

BlackBeltHelp – Statement of Work Summary

STATEMENT OF WORK ELECTRONIC SIGNATURE

By electronically signing this Statement of Work, your organization is entering into a legally binding contract with BlackBeltHelp. Please download and read carefully prior to signing. This Statement of Work, including the Statement of Work Summary, Details, Notes, Exhibit A: Standard Terms, and any applicable Attachments, will be effective when signed by the parties' authorized representatives. If there is any conflict between the Notes and Exhibit A: Standard Terms, the Notes shall prevail.

I agree to this Statement of Work, including the Statement of Work Summary, Details, Notes, Exhibit A: Standard Terms, and any applicable Attachments:

Client Authorized Signatory Signature:	
Client Name:	
Signature Date:	

BlackBeltHelp Signature:	
BlackBeltHelp, Sr. Management	
Signature Date:	

BlackBeltHelp Signature:	
BlackBeltHelp, Management	
Signature Date:	

BlackBeltHelp Signature:	
BlackBeltHelp, Delivery Operations	
Signature Date:	

EXHIBIT A: STATEMENT OF WORK STANDARD TERMS

Standard terms are available at <https://www.blackbelthelp.com/legal/blackbelthelp/sow-exhibit-a-v10252018/>

NOTE: If the link above is not hyperlinked, download this document to get the hyperlink. You can download this agreement without signing it.

BlackBeltHelp

STATEMENT OF WORK

SCHEDULE BLACKBELTHELP	00 01
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FOR

IT HelpDesk
Student Services
AdvisorAssist Desktop
AI Chatbot and Voicebot
Integration



HEADQUARTERS

936 SW 1st Ave., Suite 412,
Miami, FL 33130

CONTACT US

Tel: 844-255-2358
Email: engage@blackbelthelp.com

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BlackBeltHelp

BlackBeltHelp – Statement of Work Summary

Statement of Work

1. Statement of Work

A request for BlackBeltHelp Software and Services was requested by Client Primary Point of Contact as listed in the Statement of Work Summary. The following Software and Services are to be provided by BlackBeltHelp and are based on a fixed-bid price as set below.

2. Financial Summary

BlackBeltHelp will be providing Client with Software and remote Services for the Fees as outlined below:

Attachment:

Client is responsible for bearing the Fees referenced in “Total Cost to Client”.

3. Scope and Assumptions

This proposal is based on the following assumptions:

Attachment:



EXHIBIT A: STATEMENT OF WORK STANDARD TERMS

1. This Statement of Works Standard Terms (“Exhibit A”) as referenced in Statement of Work (“SOW”) is entered between Company (including its subcontractors, if any) and Client (collectively as “Parties”). Client has selected Company to provide certain services as set forth in the applicable SOW (“Services”) which is governed by terms and conditions of Master License and Services Agreement (“MLSA”). If there is any conflict between the MLSA and applicable SOW, this Exhibit A shall prevail.
2. **Fee and Payment**

The fee (“Fee”) for the first year specified in the Payment Schedule are payable within net 30 days from the date of invoice which shall also be the Effective Date of the applicable SOW. Fee for reoccurring years are due on the anniversary date of applicable SOW. All Services and payment are non-cancelable and non-refundable. All Fee and any due amount shall be paid in USD.
3. **Ownership**

Notwithstanding anything to the contrary contained in the SOW, all right, title and interest including all rights under patent, trademark, copyright law, trade secret or otherwise in and to the Services (collectively, “IP”) provided by Company (“Disclosing Party”) to Client in connection with applicable SOW are and will remain the property of Company, and such IP may only be used by the Client as expressly permitted in the MLSA and SOW.
4. **Delivery of Services**
 - a. Unless otherwise stated in the applicable SOW, all Services will be performed remotely. If any Services are required to be performed onsite, travel costs, lodging, meals/per-diem and incidental will be in addition to the Fee and billed to Client based on actuals.
 - b. The Parties agree to schedule the Services at least two (2) weeks in advance; scheduling of Services is subject to availability of Company’s resources.
 - c. A technical reports and other written material provided to you are in English, unless specified otherwise in applicable SOW. Client acknowledge that requesting technical reports and other written material in other or local language may take more time and efforts and may result in additional fee.
5. **Change Control Process**

Any request for any changes in Services must be in writing, this includes request for changes in project plan, scope, specifications, schedule, designs, requirements, service deliverables, software environment or any other aspect of applicable SOW. Company shall not be obligated to perform any task related to changes in time, scope, cost, or contractual obligations until Parties agree in writing to the proposed changes through an addendum to applicable SOW.



6. Term and Language

The Services shall commence on the Effective Date of the applicable SOW. The Initial Term of the Services shall be as listed in the Statement of Work Details of the applicable SOW. The SOW shall renew for identical, successive Term(s) (“Renewal Term”) as listed in the “Renewal Term(s)” in the Statement of Work Details, unless Client notifies Company in writing, at least ninety (90) days prior to expiration of the operative Initial, or any renewal Term of a Renewal Agreement, of its election to not renew.

7. Services Agreement

Client acknowledges that Company and its subcontractors’ ability to perform Services and any estimated time related, depends upon the following project assumptions and for fulfillment of the following obligations:

- a. Inform Company and its subcontractors in a timely manner of any pending scheduled upgrades, or any other modifications of the hardware and/or software environment that could affect performance.
- b. Timely provision of and access to office accommodations, facilities, equipment, assistance, cooperation, complete and accurate information and data from the appropriate personnel and management, suitably configured computer products and compliance with the obligations above (collectively as “cooperation”) are essential to performance of any Services as set forth in applicable SOW. Neither Company nor its subcontractors’ will not be responsible for any deficiency in performing Services if such deficiency results from your failure to provide full cooperation. Client is responsible for obtaining any consent required for Company and its subcontractors to perform Services under applicable SOW.
- c. If subcontractor cost of providing the Services in applicable SOW is increased because of Client’s failure to meet the obligations listed in applicable SOW, failure to provide cooperation, then Client agrees to pay Company for such increased costs. Company and subcontractor will provide Client with notice detailing the circumstances causing delay(s) by Client that need to be remedied within a certain amount of time; failure of such will result in subcontractor issuing a change order to Client for the additional hours it will expend in providing the Services due to the delay(s) referenced in the notice. If, after receipt of the notice, Client disagrees with subcontractor’s estimation of the delay(s) and the impact on the delivery of the Services, Client shall notify subcontractor, in writing, within ten (10) business days of its objections to subcontractor’s claim of delay. If Client responds to subcontractor’s notice, then the Parties will set up an executive session between Company’s designee, Client’s designee and subcontractor’s designee to resolve the dispute.



Schedule C - Statement of Work Summary
Exhibit B - Financial Summary

BLACKBELTHELP – FINANCIAL SUMMARY		
BlackBeltHelp Subscription Includes		
Item	Description	Included
TIER1 HUMAN CLOUD NETWORK – PHONE, EMAIL, & CHAT	IT & LMS Helpdesk	✓
	Student Accounts	
	Financial Aid	
	Registration and Records	
	Veteran Affairs	
	Admissions	
CUSTOMER EXPERIENCE PRODUCTS	CX Portal	✓
	AdvisorAssist Desktop	
	AI Voice & Chat Bot	
	Password Reset Tool	N/A
	Knowledge Base	
	Engagement Messaging	

BlackBeltHelp Solutions	Description	#Interactions	Price Per Unit	Year 1	Year 2	Year 3
Human Cloud Network	Student Services & IT HelpDesk	190k Interactions	\$4.25	\$807,206.00	\$807,206.00	\$807,206.00
	Interaction Handled by Bot	Unlimited Interactions	\$0.00	\$0.00	\$0.00	\$0.00
Customer Experience Platform	AdvisorAssist Desktop SaaS Licenses	1	\$60,000	\$60,000.00	\$60,000.00	\$60,000.00
	AI Chatbot	1				
	AI Voicebot	1				
	Integration with any two applications	One time				
	AdvisorAssist Desktop Named Licenses	10	\$200	\$2,000	\$2,000	\$2,000
	Implementation	One time	\$10,000	\$10,000.00	\$0.00	\$0.00
Sub-Total				\$879,206.00	\$869,206.00	\$869,206.00
Price Escalation				\$0.00	\$43,460.30	\$45,633.32
Total				\$879,206.00	\$912,666.30	\$958,299.62
Subscription (Total) After Adjustment of Price Escalation over 3 years				\$916,723.97	\$916,723.97	\$916,723.97

Below are the assumptions taken for the above pricing:

- Scope of Support – Student Services & IT HelpDesk
- Total Live-Agent Student Services Interaction Volume (Human Cloud Network) - 150,000/year
- Total Live-Agent IT HelpDesk Interaction Volume (Human Cloud Network) - 40,000/year
- Total Interactions handled by technology (Bots) – Unlimited Interactions
- ASA (Human Cloud Network) <=90 secs



Schedule C - Statement of Work Summary
Exhibit B - Financial Summary

- Hours of Support - 24x7x365
- Language Support – English & Spanish
- Student Services AHT – 7 mins
- IT Help Desk AHT - 8 mins
- Optional Years 4, 5, and 6 Price Escalation Clause: The pricing for optional years 4, 5, and 6 will include a 4% annual escalation.

Notes:

- In the revised pricing proposed on February 1st, 2024, BlackBeltHelp now offers to add unlimited Bot interactions.
- The cost of AdvisorAssist named seat licenses for 10 Broward staff is included. If Broward College wishes to purchase more licenses, then they can purchase it at a cost of \$200/license.
- The cost of integration with any two Broward College applications is included in the above pricing. Any additional integration would be charged at a 25% discounted rate of \$7,500 (One-time).
- **Broward College's agreement with BlackBeltHelp Desk stipulates the following terms regarding interaction volume pricing:**

Exhibit A					
	Total Interaction Volume	Interaction Rate (Initial Terms 1-3)	Interaction Rate (Optional Term 4)	Interaction Rate (Optional Term 5)	Interaction Rate (Optional Term 6)
Contracted/Term	190,000	\$4.25	\$4.42	\$4.60	\$4.78
Overage Buffer (<=15%)	190,001 - 218,500	\$4.25	\$4.42	\$4.60	\$4.78
Overage Excess (> 15%)	218,501 +	\$4.25 (pre-purchased) -OR- \$5.10 (not pre-purchased)	\$4.42 (pre-purchased) -OR- \$5.30 (not pre-purchased)	\$4.60 (pre-purchased) -OR- \$5.52 (not pre-purchased)	\$4.78 (pre-purchased) -OR- \$5.74 (not pre-purchased)

- Interaction volume above the annual contracted volume, up to a +15% overage buffer (190,000 + 28,500 = 218,500 total interactions), will be charged at the applicable per-interaction rate for the respective term, as listed in Exhibit A.
- For interaction volume exceeding the overage buffer total (218,501+), Broward College may pre-purchase these additional interactions, provided a sixty-day notice is given, at the same base interaction rate applicable for the term, as listed in Exhibit A.
- For interaction volume =>218,501 that Broward College does not pre-purchase in advance, these interactions will be charged at the overage premium rate for the applicable term, as listed in Exhibit A.



Optional Service Catalog:

- **One-time migration and integration from Broward's current SIS (CID) to the new SIS** -will be charged at a 50% discounted rate of \$5,000. This migration can be added anytime during the Agreement.
- **Engagement Messenger** - *Create Targeted Outbound SMS/Text Campaigns for Students*

Phone Number Type	Phone Number Procurement Time Line	# of Phone Numbers to be purchased	Implementation/Execution Timeline of each campaign	One Time Implementation Fee	Per Message Charges	Year 1 Fee
Long Code - TFN	3 working days in advance	10	7 days	\$1,500	\$0.0420	\$22,500
Random Short Code	10-13 weeks in advance	1	7 days	\$1,500	\$0.0620	\$32,500

- Initial bucket – 500,000 messages
- Additional buckets can be purchased in a group of 250,000 messages.

BlackBeltHelp Solutions	Description	#	Price Per Unit	Total
Human Cloud Network	Tier 2 Veteran Affairs, Financial Aid and Admissions Support	1561 Interactions	\$10.75	\$16,780.75
Subscription (Total)				\$16,780.75

Below are the assumptions taken for the above pricing:

- Scope of Support – Tier 2 Veteran Affairs, Financial Aid and Admissions
- Tier 2 AHT - 11 mins

Notes:

- The above-proposed pricing is based on the Tier 2 volumes shared by Broward College on 01/30/2024.
- Although Veteran Affairs support was not part of the initial RFP scope, BlackBeltHelp agrees to add Tier 1 support for Veterans Affairs as part of the initial 190k interactions. Any Interaction that requires support related to Yellow Ribbon, Chapters 31 and 35, assistance with a detailed breakdown, assistance with GI Bill inquiries, and expanding insights into other programs will not be handled by BlackBeltHelp and it will be escalated to the Broward College team.
- BlackBeltHelp will require four weeks' advance notice to start the above-referenced services for Tier 2 Veteran Affairs, Financial Aid, and Admissions Support.

Definitions

1. Incident
 - a. The documentation and associated phone calls, emails, and chats surrounding a single user's issue. This does not pertain to outages, as they are defined as a number of incidents with a singular root cause.
2. Interaction
 - a. A single phone call, email, chat, voicemail from end users to BlackBeltHelp.
3. Knowledge Base
 - a. The Knowledgebase for supporting the Client shall be maintained by BlackBeltHelp in our Salesforce instance, and the Client shall receive initial sign off on all articles used to support the Client. Client shall also receive a Knowledge Base dump of all articles at least once a year in order to maintain knowledge consistency.
4. RDP
 - a. Remote Desktop session to the Client's environment either through a secure site-to-site VPN or via a pinhole in to the Client's environment from BlackBeltHelp Data Center.
5. VPN
 - a. Virtual Private Network connection which shall be a site to site permanent connection as opposed to a by-use VPN connection via a client software.
6. Access and Ability
 - a. The rights to access the data points necessary to perform job functions as described in the Scope section, and to perform limited actions in the Client's environment limited to the scope of support.
7. Phone Average Speed of Answer (Phone ASA)¹
 - a. The time to answer an inbound phone call as calculated from the time that the Client's front side IVR greeting plays, and also to not include the time for any outage message to play.
8. Email Average Speed of Answer (Email ASA)¹
 - a. The time for an agent to receive an e-mail interaction after the ticket has been created in the Salesforce ticketing system.
 - i. This SLA is not available for client's ticketing systems.
9. Web Form Average Speed of Answer (Web ASA)¹
 - a. The time for an agent to receive an e-mail interaction after the ticket has been created in the Salesforce ticketing system.
 - i. This SLA is not available for client's ticketing systems.
10. Chat Average Speed of Answer (Chat ASA)¹
 - a. The time to answer an inbound chat excluding time for the end user to enter any requested details as configured by BlackBeltHelp and Client.
11. First Call Resolution Rate (FCR)¹
 - a. The rate at which incidents that are created by BlackBeltHelp are solved on the first call. FCR is only available for inbound phone and chat interactions, and shall also exclude ticket category, types, and items, where BlackBeltHelp would lack the access and ability to resolve.
 - b. The types of issues that are solvable shall be defined in the reporting during client launch, and shall be signed off by Client before launch.
12. Resolution Rate
 - a. The total resolution rate of all incidents for which BlackBeltHelp has Created and or modified in the life of the ticket.
13. Customer Satisfaction (CSAT)
 - a. The satisfaction rate as defined as percentage of all responses with linear weighting formulas applied, and where responses directly inquire as to the remote help desk and or service

14. Change Management

- a. All the changes to defined and documented workflows, public knowledge base and guidelines will be carried out as per BlackBeltHelp Change Management Process (CMP). The changes will need minimum of 7 business days to be executed. A copy of the BlackBeltHelp CMP will be provided to the Client.

15. Should Broward College decide to transfer ownership of any phone numbers to BlackBeltHelp, these numbers will be reverted back to the ownership of Broward College upon their request or at the end of the Agreement.

The BlackBeltHelp service model that is being provided through this contract is a dedicated service model.

Scope of Support

BlackBeltHelp will be providing Client with remote services as outlined below:

1. General IT Scope of Support

- Network Connectivity
 - Physical connectivity and troubleshooting
 - Wireless connectivity and troubleshooting
 - Mobile device connectivity and troubleshooting
- Productivity applications
 - Microsoft Office
 - Office 365
 - Google Apps
- Antivirus / Security utilities
 - Symantec
 - AVG
 - McAfee
 - Kaspersky
 - Microsoft Security Essentials
 - Microsoft Forefront
- Learning Management Systems
 - Canvas
 - Blackboard
 - Desire2Learn
 - Moodle
 - Others
- Operating System Support
 - Windows XP and newer
 - Mac OS X (10.4 or later)
 - iOS
 - Android
 - Windows Mobile
 - End user (non-college owned hardware) PC support to include functionality, BHO/ActiveX, toolbars (Excludes support for viruses for all systems)
- Email
 - Outlook
 - Microsoft Entourage
 - Mac Mail
 - Gmail
 - Microsoft Live Mail
 - Office 365
 - Outlook Web Access
- Password Reset

2. LMS Scope of Support

- Computer-related issues
- Basic Instructor Grade book issues
- How to submit a quiz
- How to post to a discussion thread
- Course Navigation
- Finding Grades
- Adding/Dropping courses
- Issues affecting multiple students
- Assignment submission failures
- Editing Course Content
- Advanced Grade book
- Course Imports/Exports/Backups
- Class Roster Issues
- Issues requiring additional access

Sample Financial Aid Support:

BlackBeltHelp will respond to questions regarding the conditions for Receiving Aid, Requirements necessary for disbursement, Cost of Attendance, Federal Loans, Current Balances, Fund Disbursement Information, Short Term Loan Information, and Refund Information.

- Financial Aid Scope and Questions:
 - How to apply
 - Eligibility Requirement
 - Types of State and Federal Financial Aid
 - Grants
 - Scholarships
 - Loans
 - Work study
 - Account Status
 - Missing Documentation
 - Selection for Verification
 - Award Amounts

Sample Admissions/Enrollment Scope of Support

- Application Process
- Admissions Status
- Requests for Official Transcripts
- Requests for Evaluation of Transcripts
- Change of Information (Demographics & other valuable information)
- Add/Drop Courses
- How to Pay for Classes
- Information on Fee Payment (Deadlines, how to etc.)
- Important Dates for a Semester
- Registration Information (deadlines, forms, etc.)
- Complete Application Process
- Medical Information (Vaccinations, Medical Check Ups etc.)
- Residency Status
- Petition Status
- Activate LancerPoint
 - Activation, password resets, etc.
- Enrollment Priorities

Help Desk Ticketing System

BlackBeltHelp agrees that interactions will be documented in client's ticketing system. The setup and use of the ticketing system will be discussed and agreed upon during implementation.

Service Level Agreement (SLA)

Metric	Service Level
Average Speed of Answer (ASA) - Phone	<= 90 seconds
Average Speed of Answer (ASA) - Chat	<= 180 seconds
Average Speed of Answer (ASA) – Email/ Tickets	<= 120 Minutes
Call Abandoned Rate	<=7%, excluding short abandoned (less than 90 sec)
First Call Resolution	>=85%

If the same SLA is missed for two (2) consecutive months, other than due to reasons beyond BlackBeltHelp’s reasonable control (e.g., volumes greater than five (5) percent of expected volumes, force majeure events, changes in applicable laws or regulations, changes to or malfunctions of client’s systems used by BlackBeltHelp, etc.), client will give BlackBeltHelp written notice of the failed service level (identifying in such notice the failures with particularity).

Upon receipt of written notice, the parties will promptly consult to determine mutually in good faith that, in fact, such failure has occurred in such period. If such failure has occurred, BlackBeltHelp shall accept such failure notice and reduce their fee by one (1) percent of the pro-rated two-month period, based on the agreed-upon forecast.

Any SLA fee adjustments will be reflected on the client’s next invoice.

BlackBeltHelp will provide a 90-day volume forecast based on historical call arrival patterns. The forecast will be submitted to the client each month. Once both parties reach agreement on the projected volumes, the 90-day forecast will be locked. The approved volumes will be used by BBH to assign staffing requirements. In any month when the volume is 105% or greater than the forecast, the results from that month will be excluded from the monthly totals. Additionally, if the actual monthly volumes are >=5% of the projected monthly volumes, BlackBeltHelp will not be held to SLA obligation for that month.

BlackBeltHelp follows an 8 week ramp-up period of service stabilization. During the initial 8 weeks after going live, SLAs will be tracked for review purposes but shall only be officially reported 8 weeks following launch for penalty purposes.

- **Broward College's agreement with BlackBeltHelp Desk stipulates the following terms regarding interaction volume SLAs:**
 - If the total interaction (offered interaction) volume for a particular month exceeds 5% or more of the total (IT Help Desk and Student Services combined) forecasted volume for that month, BlackBeltHelp will be exempted from the Service Level Agreement (SLA) obligations for that month.
 - If the interaction (offered interaction) volume for either IT Help Desk or Student Services exceeds 15% or more of the line-of-business-specific forecasted volume for a particular month, BlackBeltHelp will be exempted from the Service Level Agreement (SLA) obligations for that month, regardless of the total (IT Help Desk and Student Services combined) interaction volume forecasted for that month.

Volume Forecast

BlackBeltHelp will base staffing and resource planning on volumes mutually agreed upon with Broward College using current and historical data.

These volumes will be reviewed and mutually agreed upon by Broward College and BlackBeltHelp on a quarterly basis, 90 days in advance.

Example allocation of total annual volume by month and line of business.

Estimated Monthly Inbound Interactions												
Month	January	February	March	April	May	June	July	August	September	October	November	December
IT Helpdesk	3,572	1,919	2,118	3,233	3,826	3,413	5,154	6,787	3,082	2,445	1,805	2,646
Student Services	13,395	7,197	7,944	12,123	14,346	12,798	19,326	25,455	11,556	9,168	6,768	9,924
Total	16,967	9,116	10,062	15,356	18,172	16,211	24,480	32,242	14,638	11,613	8,573	12,570

Project Management

BlackBeltHelp Implementation Coordinator:

Name:	James Tetzlaff
Phone:	(844) 255-2358 X 521
Fax:	(216) 589-9639
Email:	james_tetzlaff@blackbelthelp.com

BlackBeltHelp Delivery Manager:

Name:	Charles Gaskins
Phone:	(844) 255-2358 X 304
Fax:	(216) 589-9639
Email:	charles_gaskins@blackbelthelp.com

BlackBeltHelp Client Relationship Manager:

Name:	Joel Turpin
Phone:	859.338.4185
Fax:	(216) 589-9639
Email:	joel_turpin@blackbelthelp.com

Assumptions

- The agreed SLAs are subject to an Average Handle Time (AHT) of ≤ 8 minutes for IT/LMS and ≤ 7 minutes for Student Services.
- BlackBeltHelp will support up to the volume stated in the financial section per year (365 days of service) during the term of the statement of work.
- Any volume above the annual request volume can be calculated at rate defined in the financial section of the statement of work for each additional interaction over purchased volume.
 - Overage rates are subject to annual increases.
- In the event that actual annual support volume exceeds assigned volume, the renewal contract will be adjusted upward to reflect actual support volume in consultation with Client.
- Unless otherwise specified, monthly distribution of support interactions will follow a traditional academic calendar and the total assigned volume and resources for call center operations will be allocated.
- All fees are listed in USD.
- BlackBeltHelp shall provide support via the following interaction channels
 - Inbound phone calls
 - Outbound phone calls for call backs to end users.
 - Email notification to BlackBeltHelp's inContact interaction management system
 - Ticket notifications must only be delivered when it is intended for BlackBeltHelp to work the ticket.
 - We will not discard any interactions.
 - Branded HTTPS chat interface (Client responsible for licensure fee if applicable)
- Client shall provide the required access to relevant systems in order for BlackBeltHelp to provide services as specified.
 - If Client is unable to provide BlackBeltHelp access that is limited to perform the functions, and Client only provides access greater than the required access to perform the necessary job function, BlackBeltHelp disclaims any and all responsibility for any changes to the relevant systems.
- Support Calls will be routed through and tracked by BlackBeltHelp's interaction management system, inContact.
- All phone calls shall be recorded and recordings shall be maintained for one year beyond the date of interaction.
- Downtime:
 - If downtime is required, it will be schedule on weekends and/or during after-hours.
 - If downtime will impact Client, BlackBeltHelp will give at least two-week notice to Client along with level of impact in down time.
- BlackBeltHelp as part of the discovery and implementation shall recommend a specific IVR strategy, and Client must accept IVR process flow and/or request modifications 10 business days before go live.
 - Failure to accept the IVR process flow by the desired go-live date shall have the same effect as going live as it pertains to the counting days of service.
- BlackBeltHelp and Client shall agree to report formats and data contained therein.
 - If Client is not utilizing BlackBeltHelp's Salesforce instance, BlackBeltHelp will not provide any reporting to the Client that is based on data from tickets or incidents, and shall only contain data from BlackBeltHelp inContact interaction Management System.
 - BlackBeltHelp will provide reports on at least a Monthly basis
- Service level reporting will be measured monthly and be available through periodic reporting.
- Service level objectives will be calculated starting 8-weeks after the go-live date, and shall be calculated using monthly averages.
- If the Client has an unplanned outage or unannounced maintenance, service levels for the time of outage, plus 24 hours beyond the end of the outage, shall be waived from any service level achievement requirements, and shall not be held against BlackBeltHelp in any way as a failure to perform.

- If the Client will be utilizing BlackBeltHelp's Salesforce instance, BlackBeltHelp shall provide access to and setup surveys on case closure, and up to 4 annual periodic surveys at no cost.
- If the Client performs CSAT surveys that relate to the service provided by BlackBeltHelp, the Client shall provide BlackBeltHelp the relevant data in order to address potential issues.
 - Failure to provide the data within 30 days of the relevant survey shall negate the ability of the Client to escalate to BlackBeltHelp the issue due to timeliness issues.
- The BlackBeltHelp service is available only for Client's end users.
- Conflicting Terms - In the event there is a conflict or ambiguity between the terms and conditions of this Statement of Work and BlackBeltHelp Master License Service Agreement, the terms and conditions of this Statement of Work shall control and prevail.
- Any additions, modifications, or removal of scope items must be in writing, and must be accepted by BlackBeltHelp.
 - Changes shall take up to 15 business days to take full force and effect.
 - Customer will be required to perform acceptance testing of all changes.
 - Failure to perform testing and acceptance does not imply rejection but shall be construed as de facto acceptance.

BlackBeltHelp Artificial Intelligence (AI) Statement of Work

1. Definitions

• Interaction

- A single session, within the BlackBeltHelp AI platform, between an end user and AI Bot. Any extension of a session external to the BlackBeltHelp AI platform constitutes a new interaction. Multiple AI platform sessions may not be bridged.

• Knowledge Base / FAQ list

- The repository of information, provided to BlackBeltHelp by the client, to be used by BlackBeltHelp in supporting the client and their user community. The knowledge base shall be maintained by BlackBeltHelp with content from the client, and the client shall also receive a knowledge base dump of all articles at least once a year to maintain knowledge consistency.

• Access and Ability

- The rights to access the data points necessary to perform job functions as described in the scope section, and to perform limited actions in the client's environment limited to the scope of support.

• Average Speed of Answer (ASA)

- The average time to answer an inbound query as calculated from the time that the client's query is sent, to the time that query is acknowledged by the recipient.

• Response Accuracy

- The accuracy in response to the questions asked by end-users
- Response accuracy is dependent on the transcripts and conversation data provided by the client. Accuracy shall be defined and mutually agreed to in the reporting during client launch and shall be signed off by the client prior to the launch. Response Accuracy shall also exclude responses where BlackBeltHelp would have insufficient information.

• Resolution Rate (%)

- The total number of requests resolved by AI Bot, represented as a percentage of the total number of requests received by AI Bot for resolution.

• Change Management

- All the changes to defined and documented workflows, public knowledge base and guidelines will be carried out as per BlackBeltHelp Change Management Process (CMP). The changes will need minimum of 7 business days to be executed. A copy of the BlackBeltHelp CMP is provided to the client.

• Artificial Intelligence (AI)

- The simulation of human intelligence by a BlackBeltHelp AI Bot platform.
- The AI processes include, but are not limited to, learning (the acquisition of information and rules for using the information), reasoning (using the rules to reach approximate or definite conclusions), and self-correction.

• Conversational History / Transcripts

- Written or recorded interaction data of previous conversations between students and onsite team members.

2. Scope

BlackBeltHelp will implement Artificial Intelligence (AI) Bot for IT and OneStop. Broward College reserves the right to position the BlackBeltHelp OneStop and IT Chat Bot on any webpage within the Broward.edu domain. The Bot is capable of:

- Integrating with the chat application provided by BlackBeltHelp
- Assisting students, staff, and faculty with general FAQ IT and OneStop questions
- Chatbot reporting and transcripts will be available for review
- Transferring a chat to a live agent if AI is not able to answer a question multiple times or multiple questions

3. Ticketing System

BlackBeltHelp will use its ticketing system to create tickets.

4. Performance Target

- Response Accuracy:
 - Month 1 > 70%
 - Month 2 > 80%

BlackBeltHelp follows a 8-weeks plan for service stabilization through a pilot; soft launch and full-production launch process. Hence, performance targets will be tracked for review purposes but shall only be officially reported 8-weeks following the pilot launch.

5. Timelines

BlackBeltHelp will send discovery documents post kick-off to the client. Upon receiving filled and accurate discovery documents, BlackBeltHelp will initiate the implementation.

- The implementation timeline may vary depending upon the scope and size of the client.

6. Assumptions and Dependencies

This Statement of Work is based on the following assumptions:

- This contract will cover 24x7x365 IT and OneStop Bot with 99.95% up-time (besides scheduled maintenance)
- All fees are listed in USD
- BlackBeltHelp shall provide support via chat under this Statement of Work through the AI platform
- Client shall provide the required access to relevant systems and personnel, for BlackBeltHelp to provide the services as contracted. If client is unable to provide BlackBeltHelp access that is limited to perform the functions, and client only provides access greater than the required access to perform the necessary job function, BlackBeltHelp disclaims all responsibility for any changes to the relevant systems. The client will provide to BlackBeltHelp information regarding IT and OneStop, which will include:
 - Frequently asked questions and answers
 - Forms links and details, in case the user needs assistance in filling them
- Support chats will be routed through and tracked by BlackBeltHelp's interaction management system, NICE inContact.
- All chat interactions shall be recorded, and transcripts shall be maintained for one year beyond the date of interaction.
- Downtime:
 - If downtime is required, it will be scheduled on weekends and/or during after-hours.
 - If downtime will impact client, BlackBeltHelp will give at least two-week notice to client along with level of impact in down time.
- BlackBeltHelp as part of the discovery and implementation shall recommend a specific scope of support,

and client must approve conversation flow and/or request modifications 10 business days of receiving the flow.

- Failure to accept the application flow within the timeline shall have the same effect as going live as it pertains to counting days of service.
- BlackBeltHelp and client agree to report formats and data contained therein.
- If client is not utilizing BlackBeltHelp's Salesforce (ticketing system) instance, BlackBeltHelp will not provide any reporting to the client that is based on data from tickets or incidents and shall only contain data from the BlackBeltHelp inContact (interaction management system).
- Bot related reporting will be available via Simplify (BlackBeltHelp Integrated Platform).
- BlackBeltHelp will provide reports monthly unless otherwise contracted (additional fees will apply).
- Service level reporting will be measured monthly and be available as such.
- Service level objectives will be calculated starting 8-weeks after the go-live date and shall be calculated using monthly averages.
- If the client has an unplanned outage or unannounced maintenance, service levels for the time of outage, plus 24 hours beyond the end of the outage, shall be waived from any service level achievement requirements, and shall not be held against BlackBeltHelp in any way as a failure to perform.
- The BlackBeltHelp service is available only for client's end users.
- Chatbot is being provided for support for institutions' IT and OneStop departments and will only be deployed for that office's use
- New departments can be added at additional cost
- Conflicting Terms - In the event there is a conflict or ambiguity between the terms and conditions of this Statement of Work and the Master License Service Agreement, the terms and conditions of this Statement of Work shall prevail.
- Any additions, modifications, or removal of scope items must be in writing, and must be accepted by BlackBeltHelp.
 - Changes shall take up to 15 business days to take full force and effect.
 - Customer will be required to perform acceptance testing of all changes within 5 business days of implementation.

Failure to perform testing and acceptance within 5 business days does not imply rejection but shall be construed as de facto acceptance.

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP



BlackBeltHelp

Response To:

Broward College

Contact Center Services

RFP# ITN-2023-055-TP

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

GENERAL INFORMATION

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BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

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ITN Number	ITN-2023-55-TP
Date	August 14, 2023
Subject	Contact Center Services
Name of the Respondent	BlackBeltHelp, LLC
Address	936 SW 1st Ave., Suite 412, Miami, Florida 33130
Telephone Number	(844) 255-2358 Ext. 511

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BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

TAB 2

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

LETTER OF TRANSMITTAL

BlackBeltHelp, LLC is pleased to submit its proposal to Broward College in response to the Request for Proposal for Inbound/Outbound Call Services at BROWARD COLLEGE (RFP# ITN-2023-055-TP).

BlackBeltHelp is a wholly owned subsidiary of CampusEAI, Inc. (*a Minority and Women-Owned Business*), founded in 2003. We are registered in the states of Delaware and New Jersey, and we are headquartered in Miami, Florida. BlackBeltHelp operates 24/7/365 contact centers from the following locations:

- Work from-home operations based in and around Chicago, IL, Cleveland, OH, Somerset, KY, and Sacramento, CA
- Gurgaon, India (Not applicable for Broward College)

BlackBeltHelp was founded by education for education, developing our first contact center around the needs and desires of our development institutions, a culmination of private and public two and four-year colleges and universities. Today, BlackBeltHelp is Higher Education's #1 AI-powered Contact-Center-as-a-Service provider for students, faculty, and staff. We have over 400 full-time employees, handling over 1.3 million support requests annually from approximately 4 million users distributed across our clients.

We appreciate the opportunity to respond to this Request for Proposal and look forward to walking you through our response in more detail at your earliest convenience.

Regards,
Anthony R. Humphreys
President

Name of the Firm	BlackBeltHelp , LLC
Business Address	936 SW 1st Ave., Suite 412, Miami, Florida 33130
E-mail	info@blackbelthelp.com
Firm Representative's Name	Alex Gibson
Firm Representative's E-mail	alex_gibson@blackbelthelp.com
Firm Representative's Phone	(844) 255-2358 Ext. 511

ACKNOWLEDGEMENT OF RELEASED ADDENDA TO SOLICITATION



PROCUREMENT SERVICES
Cypress Creek Administrative Center
6400 NW 6th Way, Fort Lauderdale, FL 33309
Phone 954-201-7455/Fax 954-201-7330

ADDENDUM No. 1

ITN No.: ITN-2023-055-TP
ITN TITLE: CONTACT CENTER SERVICES
DATE: September 8, 2023

This addendum is being issued to clarify and/or revise the solicitation documents, virtual solicitation conference meeting clarifications, and/or solicitation specifications. This Addendum modifies, supplements, and/or replaces information in the INVITATION TO NEGOTIATE (ITN) titled CONTACT CENTER SERVICES (ITN-2023-055-TP), and is hereby made part of the original solicitation documents.

Unless specifically modified by this Addendum, the previously issued documents remain unchanged and in the event of a conflict between this Addendum and previously issued documents, this Addendum shall prevail.

REVISIONS TO ITN

1. REFER TO ATTACHMENT A – SCOPE OF SERVICES – A. PURPOSE

DELETE: The College plans optimize service with an advanced omnichannel operation (including multilingual support) with the use of modern technology, automation, and self-service along with a personalized 'white glove service model' for live interactions on or before July 1, 2023.

REPLACE WITH: The College plans to optimize service with an advanced omnichannel operation (including multilingual support) with the use of modern technology, automation, and self-service along with a personalized 'white glove service model' for live interactions on or before July 1, 2024.

2. REFER TO ATTACHMENT J – PERFORMANCE EVALUATION SURVEY FORM

DELETE: Please email this form to Orlando Aponte at tprather@broward.edu once completed in PDF format prior to 2:30 p.m. ET on: Monday, October 2, 2023.

REPLACE WITH: Please email this form to Orlando Aponte at oaoponte@broward.edu once completed in PDF format prior to 2:30 p.m. ET on: Monday, October 2, 2023.

3. RESPONSES TO QUESTIONS AND REQUESTS FOR INFORMATION FOR ITN

Q1 Please reconfirm the due date for this procurement by providing it in response to answers to questions.

R1 Refer to SECTION 1 of the solicitation document.

Q2 What is the date by which you will answer these questions?

R2 Refer to SECTION 2.7 of the solicitation document.

Q3 Why has this bid been released at this time?

R3 To replace the existing contract that will expire in June 2024.

Q4 Is there a deadline for questions?

R4 Refer to R2.

Q5 When is the anticipated award date?

R5 Refer to R2.

Q6 Are bidders permitted to deviate in any way from any manner of quoting fees you may be expecting? For example, if there is a pricing page in the RFP, can bidders submit an alternate fee structure? If there is no pricing page in the RFP, do you have any preference for how bidders should quote fees or can bidders create their own pricing categories?

R6 Refer to Section "NOTE" of ATTACHMENT B – PRICE RESPONSE FORM.

Q7 Please describe your level of satisfaction with your current or recent vendor(s) for the same purchasing activity, if applicable.

R7 The College may discuss this information with shortlisted vendors.

Q8 Has the current contract gone full term?

R8 Yes.

Q9 Have all options to extend the current contract been exercised?

R9 No.

Q10 Who is the incumbent, and how long has the incumbent been providing the requested services?

R10 Blackboard has provided Contact Center as a Service for Broward College since 2018.

Q11 How are fees currently being billed by any incumbent(s), by category, and at what rates?

R11 The College may discuss this information with shortlisted vendors.

Q12 What estimated or actual dollars were paid last year, last month, or last quarter to any incumbent(s)?

R12 The College may discuss this information with shortlisted vendors.

Q13 What is the minimum simultaneous inbound call capacity?

R13 There should be no minimum capacity for the vendor who provides the service.

Q14 What is the maximum wait time?

R14 The maximum wait time should be less than or equal to 2 minutes.

Q15 What is the maximum hold time?

R15 Hold time will vary based on circumstance and the College may discuss with shortlisted vendors.

Q16 What percentage of inbound calls must be answered by a live operator?

R16 Operators should answer between 90%-100% of calls based on volume and circumstance. The College may discuss this with shortlisted vendors.

Q17 What percentage of calls must be resolved without a transfer, second call, or a return call?

R17 First call resolution should be greater than or equal to 90%.

Q18 What is the maximum percentage of calls that can be terminated by the caller without resolution?

R18 Refer to R17.

Q19 Is there a minimum or maximum number of operators and supervisors?

R19 There is no minimum or maximum number of operators and supervisors required. Staffing would be the responsibility of selected vendor based on volume projections and organizational structures.

Q20 What are the required language options?

R20 Multilingual support is required with Spanish and Creole preferred. Language options may be discussed in more detail with shortlisted vendors.

Q21 What is the required degree of dedication for the call center?

R21 Refer to SECTION 2.2 of the solicitation document.

Q22 What is the required degree of dedication for the operators?

R22 Refer to R21.

Q23 Are callers required or allowed to connect with a message verification system or pre-recorded message before connecting to a live operator, or must a live operator be the initial contact?

R23 Yes. Intelligent IVR with smart routing is acceptable.

Q24 What are the recording requirements for inbound and outbound phone calls and how long must recordings be maintained?

R24 All calls will be monitored and recorded with unlimited accessibility either by access or request from the College.

Q25 What are the recording and storage requirements for non-phone communications?

R25 Vendor will provide storage for all contact center communication data including calls, chats, emails, etc.

Q26 What information is to be included in call logs?

R26 Call logs would need to include, but not limited to, various components for efficient call tracking and reporting such as the origin of case (call, chat, email, etc), the user type (prospect, student, parent, etc.), the user request category, and a summary and detailed notes of the interaction.

Q27 What is the current number of seats for operators and supervisors at your existing call center?

R27 The College may discuss this information with shortlisted vendors.

Q28 What is the current average wait time for phone calls?

R28 Current service levels are dictated at a 2-minute maximum wait time.

Q29 What is the current average handle time for phone calls and other types of communications?

R29 Current service levels are dictated by a 7-minutes handle time for One-Stop and an 8-minute handle time for Help Desk. The College may discuss this information further with shortlisted vendors.

Q30 What is the current average after-call work time for operators?

R30 Information not available at this time.

Q31 Over the past year, what is the percentage of calls received in English versus non-English?

R31 Information not available at this time.

Q32 Over the past year, what percentage of calls received were in Spanish?

R32 Information not available at this time.

Q33 Is the college looking for: 1) Vendor who will provide both the staffing and systems or 2) Just the systems (Software as a Service) and the college will use its own personnel to staff the contact center?

R33 The College is seeking a vendor to provide full on Contact Center Services for the College including both software and staffing solutions.

Q34 Can we include our own terms for Broward to consider? If not, can we provide alternative language to the included terms?

R34 The final contract clauses may be negotiated between the parties. Refer to SECTION 6.2 of the solicitation document.

Q35 Could you please expand on the requirement to provide service domestically - is this specific to Student Services (i.e. Financial Aid, Admission, etc.) or are both Help Desk and Student Services required to be provided domestically.

R35 All services will need to be onshore for both lines of business. Offshore will not be considered.

Q36 How many agents are supporting the current project?

R36 Information not available at this time.

Q37 What is the average handle time for all student communications (i.e. phone, email, chat, etc.)?

R37 Refer to R29.

Q38 Can you share a sampling of historical call arrival patterns?

R38 No.

Q39 Could you disclose the annual budget for these services?

R39 The College may discuss this information with shortlisted vendors.

Q40 Could you confirm as during the pre-bid call that vendors are not required to have an office in Florida?

R40 Vendors are not required to have an office in Florida, but will be required to be onshore and be able to provide services in Florida.

Q41 What is the estimated budget allocated for this project?

R41 Refer to R39.

Q42 What is the current cost incurred by Broward College to manage the present contact center?

R42 The College may discuss this information with shortlisted vendors.

Q43 What challenges Broward College is currently facing with the current delivery of services?

R43 The College may discuss this information with shortlisted vendors.

Q44 What is the monthly breakdown of volumes for total inbound calls, chats, emails, and web cases individually?

R44 The College may discuss this information with shortlisted vendors as the data varies based on peak/non-peak periods.

Q45 Can you provide the individual call volume for OneStop Support and IT Help Desk Support?

R45 Projected volume for One Stop support is roughly 150,000 incidents per year while Help Desk is roughly 40,000 incidents per year.

Q46 What is the performance of your current delivery in terms of Average Speed to Answer?

R46 Refer to R14.

Q47 What is the performance of your current delivery in terms of Average Handle Time?

R47 Refer to R29.

Q48 What is the performance of your current delivery in terms of Abandon Rate percentage?

R48 Refer to R16.

Q49 What is the performance of your current delivery in terms of First Call Resolution percentage?

R49 Refer to R17.

Q50 What are the pain areas in your current delivery center?

R50 The College may discuss this information with shortlisted vendors.

Q51 Would Broward College leverage our Contact-Center as a Service software? Or will there be individual systems for the college and vendor?

R51 The College would consider leveraging Contact Center Service software with integration capabilities within internal systems and software.

Q52 How does this project align with and contribute to the overall objectives outlined in the institution's master plan?

R52 Refer to ATTACHMENT A – SCOPE OF SERVICES of the solicitation document.

Q53 Please confirm the duration of CSR new hire training.

R53 The College may discuss this information with shortlisted vendors.

Q54 Will the new vendor be expected to create brand new training material for vendors' staff supporting Broward College under the new contract?

R54 The College does have a database of training and knowledge that will be shared with the selected vendor. Training materials, however, would need to be created by the vendor as staff training and continuous staff development would be the responsibility of the selected vendor.

Q55 Will Broward College provide the new vendor with training material?

R55 Refer to R54.

Q56 Please provide a current job description for the CSR's responding to calls, emails, chats, etc.

R56 The College may discuss this information with shortlisted vendors.

Q57 Does the vendor need to provide technology for Workforce Management? (i.e., scheduling, call arrival patterns, volume analysis?)

R57 Yes.

Q58 Should the vendor provide QA recording technology? What % recording or screen capture % is required?

R58 Yes. The vendor will be required to record 100% of interactions. Percentage breakdown between recording and screen capture may be discussed with shortlisted vendors.

Q59 Can Broward College confirm the total budget for the contract term for the 3 years?

R59 Refer to R39.

Q60 Will the new vendor be replacing the chat bot and or the live webchat technology tool that is available on the Broward College website?

R60 The College will explore chatbot software as offered by vendors as a replacement to current technology.

Q61 Will the vendor be expected to replace all of Broward college's tools that are listed today within the ITN, or is the vendor expected to use their technology tools and integrate their solution with some of the tools Broward utilizes?

R61 Vendor will be expected to use technology tools to integrate solution with College tools. Replacement of current tools may be discussed with shortlisted vendors.

Q62 How many CSR's does Broward College have on staff today answering contacts via inbound call, email or chat relative to scope of current ITN?

R62 Information not available at this time.

Q63 Can Broward College provide average handling times? This will help vendors price per contact with higher accuracy. (if per contact is required based on attachment B).

R63 Refer to R29.

Q64 Please confirm if work at home or remote CSRs is acceptable.

R64 Yes.

Q65 Does Broward College prefer that the vendor recruit local Broward College students?

R65 The College may discuss this information with shortlisted vendors.

Q66 Please confirm the definition of incidents. Are incidents contacts the agents will receive, or are there separate lines of business or channels the CSRs will handle?

R66 Incidents are end user contacts made to the contact center and serviced by agents via phone, chat, email, etc. that meet the threshold for average speed to answer service level agreements.

Q67 Does Broward College require live Bilingual Spanish/English CSRs, or is a language line acceptable for any language outside of English?

R67 Bilingual Spanish/English language support is required.

Q68 Please confirm a list of all technology functionalities that the vendor should include in their pricing.

R68 Interactive Voice Recording (IVR), Intelligent call routing, AI Agent Assist, Automated Self-Service technologies, Chatbot tools, Automated Financial Aid Application status tracker, call and agent screen recording tools, available cloud-based CRM or software tools for interaction and case management accessible to the client.

Q69 Will the knowledge base be provided by Broward college, or should the vendor include a knowledge management tool in their pricing?

R69 Both.

Q70 Please confirm if and how many CSRs and staff are needed for overnight intervals?

R70 Information not available at this time.

Q71 Please provide call/contact arrival patterns by interval, day, week and month.

R71 Information not available at this time.

Q72 Should the vendor include IVR and telephony, or will this be provided through the College?

R72 The vendor will include IVR software tools for callers and telephony software for agents.

Q73 Does Broward College have specific QA/QC requirements that the vendor should consider?

R73 The College may discuss this information with shortlisted vendors.

Q74 Does Broward College accept proposals inclusive of some nearshore or offshore support staff only? (WFM, QA, etc)

R74 Refer to ATTACHEMENT A – SCOPE OF SERVICES, SECTION A – PURPOSE, of the solicitation document.

Q75 Please confirm if 100% of the vendors staff and solution need to be based in the continental US?

R75 Refer to ATTACHEMENT A – SCOPE OF SERVICES, SECTION A – PURPOSE, of the solicitation document.

Q76 Please confirm hours of operation relative to staff handling inquiries for this ITN. (Pricing/wages can vary for overnight shifts, understanding the volume patterns or how many should work in standard hours of operation vs. overnights will assist pricing be of higher accuracy)

R76 The College is seeking a 24/7/365 support model. Other options may be discussed with shortlisted vendors.

Q77 Please confirm if the vendor needs to provide a specific type of phone and if we need to use a specific carrier for the phone lines?

R77 No.

Q78 Do the CSR's handle all contact types that come in? Can Broward College explain the types of call types or lines of business? (What and how many contacts come in on voice, to email, to chat?)

R78 Refer to ATTACHMENT A – SCOPE OF SERVICES regarding lines of business. Contact data may be discussed with shortlisted vendors.

Q79 Please confirm on attachment B – Price response form, is the “unit price” that the college is looking for - per hour, or per contact?

R79 Pricing model is on a per contact (incident) basis.

Q80 Please confirm the # of chat bot intents Broward provides through the website.

R80 Information not available at this time.

Q81 Please confirm the current IVR, ACD, and CRM that the college utilizes today?

R81 IVR and telephony for Contact Center as a Service is provided by vendor. Refer to ATTACHMENT A – SCOPE OF SERVICES, SECTION B – BACKGROUND, of the solicitation document.

Q82 Please confirm the current Service Level goal, Abandon Rate, AHT, and any other Key Performance Indicators the vendor should include in their staffing and pricing model?

R82 Refer to R14, R16, R17, and R29.

Q83 Is the vendor required to develop a smartphone app for the college, or assist with the integration of the mobile app to contact center agents/chat?

R83 The College may discuss this information with shortlisted vendors.

Q84 Is the college looking for a dedicated vendor resource to manage and maintain the current knowledge base?

R84 Yes. The College will also support the vendor in creation and moderation of knowledge base.

Q85 How many knowledge base articles exist today?

R85 Information not available at this time.

Q86 Does the vendor need to include a customer satisfaction survey in their solution, or is this included from Broward College?

R86 Vendor will need to include a customer satisfaction survey in the solution.

Q87 Please include the most common call types or interactions that the College would be interested in automation.

R87 Financial Aid Application status report and account login/password reset troubleshooting.

Q88 Can Broward College share the current opportunities or pain points that they would like improvement?

R88 The College may discuss this information with shortlisted vendors.

Q89 Please confirm the anticipated contract award date?

R89 Refer to R2.

Q90 Please confirm more information about the seasonality and or possible fluctuation in volumes. How many additional agents are required (if any) during seasonal or high-volume enrollment periods?

R90 Typical peak volume times are before, during, and immediate after term start dates for the spring, summer, and fall (January, May, and August respectively). The College may discuss additional agent hiring practices with shortlisted vendors.

Q91 Are SMS and texting capability recommended to include in the vendor's solution?

R91 Yes.

Q92 Please confirm more information on the tiered escalation pathways. How are the escalations handled today, how many tiers should the vendor include?

R92 Current escalation pathways are tiered at 2 or 3 levels based on lines of business and scope of support. The College may discuss this information with shortlisted vendors.

Q93 2.2 Purpose of ITN indicates the services would need to be offered 24/7/365 days per week. If the vendor offers extended hours, but not a full 24/7/365, would the proposal be non-responsive?

R93 24/7/265 is the preferred service model. Other models may be considered.

Q94 2.3 Objective and Minimum Eligibility Criteria. As the school's contract expires in June 2024, when does the college expect to start services with a new vendor? What is the preferred Go Live date?

R94 Services would be expected to start on July 1st, 2024. The College may discuss this information further with shortlisted vendors.

Q95 3.12 Conditions for Emergency/Hurricane or Disaster (Force Majeure). Could the college expand on how the first priority basis would impact contact center support?

R95 The College may discuss this information with shortlisted vendors.

Q96 3.14 Confidential Information. Are there specific "confidential" markings that we need to use to designate a deliverable as being confidential?

R96 No specific markings, refer to SECTION 3.14 of the solicitation document in its entirety.

Q97 3.18 Price Adjustments. Can the College define which PPI index would be used and provide a link to the same?

R97 To be determined in resulting contract.

Q98 Attachment A, A. Purpose. If the vendor responds with a proposal supporting only student services and not LMS or IT Help Desk, would the vendor be non-responsive?

R98 Yes. Vendor responses must include Student Services & LMS/IT Help Desk.

Q99 Attachment A, B. College Current Systems and Capabilities. Would the vendor be required to access EAB Navigate?

R99 Vendors should be prepared to integrate with any and all systems at the College, including EAB, as necessary.

Q100 Attachment A, B. College Current Systems and Capabilities. If the vendor remotely accesses systems, where would we make notes within each system to support each of the offices?

R100 The College may discuss this information with shortlisted vendors.

Q101 Attachment A, B. College Current Systems and Capabilities. Does the college use a phone system provided by vendor or does the college have their own?

R101 The College has its own system (Zoom Phone) for internal employee use. Vendors will need to supply their own telephony system for agents handling calls.

Q102 Attachment A, B. College Current Systems and Capabilities. Does the financial aid office still use WolffPack/Financier?

R102 Yes.

Q103 Attachment A, B. College Current Systems and Capabilities. Will the existing knowledgebase data be made available to the new vendor?

R103 Refer to R54.

Q104. Attachment A, C. Scope of Services. Please provide volume reports for after-hours and weekend incidents.

R104 The College may discuss this information with shortlisted vendors.

Q105 Attachment A, C. Scope of Services. Please provide a breakdown of call volume by office/division, i.e., student services, IT, LMS.

R105 Refer to R45.

Q106 Attachment B. Because our cost basis is per interaction and varies based on interaction type, the tier-based pricing (blended omnichannel) chart cannot be completed. Can the vendor provide all pricing details as page 2?

R106 Yes.

Q107 Attachment B. The vendor does not have monthly recurring fees but has annual recurring fees. Should these be reported in page 2?

R107 Yes.

Q108 Attachment L, #22. Please define “competitor”.

R108 A competitor would be considered any other higher education institution.

Q109 Attachment M, #47. Is the college looking for outbound text capabilities?

R109 Outbound text capabilities will be considered.

Q110 How many in house agents and how many outsourced agents are currently used to support Broward College?

R110 The College may discuss this information with shortlisted vendors.

Q111 Please provide specific detail on what Broward College wants from an integration with their current systems, how you would like each to work with the contact center software and how does it work today:

- CID
- Target X
- EAB (BC Navigate)
- Team Dynamix
- Zoom
- Microsoft TEAMS
- Microsoft SQL and Power BI

R111 The College may discuss this information with shortlisted vendors.

Q112 How many participants will be shortlisted?

R112 Refer to SECTION 5.1.4.a. of the solicitation document.

**Q113 Please provide call center data on the following items:
Average Handle Time
Average Speed to Answer**

R113 Refer to R14 and R29.

**Q114 What are the performance expectations in the following areas:
Required Target Answer Time
Required % of calls answered with the target answer time
Required First Call or First Contact Resolution Requirements**

R114 Refer to R14, R16, R17, and R29.

**Q115 Please provide call volumes by the following time periods:
Weekday business hours
Weekday after business hours
Weekend business hours
Weekend after business hours**

R115 The College may discuss this information with shortlisted vendors.

Q116 What is the value of the current contract?

R116 Refer to R39.

Q117 Is there a separate billing rate for chats versus live agent calls?

R117 The College may discuss this information with shortlisted vendors.

Q118 Is self-help considered a billable interaction?

R118 No.

Q119 Are live agent calls or chats that are abandoned before an agent response billable? What are the parameters for a billable interaction?

R119 No. Conversation regarding billable interactions may be discussed with shortlisted vendors.

Q120 Are each of the Broward College current systems API enabled?

R120 Most, if not all systems for contact center support have integration capabilities.

Q121 Attachment M, Section 7. Please clarify what agent assist means to Broward College.

R121 Automated software or AI technology that can assist an agent on a live interaction to boost performance.

Q122 Attachment M, Section 8. Please clarify what is meant by agent call presence.

R122 Agent call presence meaning the agents have the ability to control their availability (i.e., completing tasks or engaging with customers).

Q123 Attachment M, Section 10. Please clarify if agent queue stat display is per agent or for all agents to see all.

R123 Can be either or pending vendor structure. Agent queue stat display to see a live view of per agent or all agent activity.

Q124 Attachment M, Section 14. Please define what is meant by Alarm notification, escalation and routing capabilities.

R124 In the event an interaction is a cause for immediate escalation (threats, self-harm, etc.) the agents can alarm supervisor org. Within vendor and a the college for immediate escalation and properly route to areas such as campus safety.

Q125 Attachment M, Section 15. Please define what is meant by answer detection (inbound, outbound).

R125 Tools in place to automatically determine if a human or automated answering system has answered a call to increase efficiency

Q126 Attachment M, Section 21. Please clarify what is meant by automatic file retrieval.

R126 Ability to automatically pull a student file with key information such as a phone number as opposed to having to manually search a database.

Q127 Attachment M, Section 28. Please clarify what is meant by case aging reporting.

R127 Reporting tools to determine the age of case escalations and when they have been resolved. Provides a detail of any outstanding cases that are yet to be reviewed or resolved.

Q128 Attachment M, Section 29. Please clarify case response time reporting.

R128 How quickly an escalated case is being responded to.

Q129 Attachment M, Section 30. Please clarify client coaching requests and reporting.

R129 Ability for the College to conduct its own QA and submit coaching requests to the vendor for agent specific interactions as a measure to identify service issues and assist with training of agents.

Q130 Attachment M, Section 34. Please define what is meant Contact Center All-in-One Suites- is it a bundle of features as compared to an a la carte feature purchase.

R130 Yes. Contact Center All-in-One suites that offer all of what is described throughout the solicitation document without the need to pay for additional services a la carte unless necessary.

Q131 Attachment M, Section 36. Please define what is meant by Contract Compliance Reporting.

R131 Access to compliance reporting based on service level agreements as outlined in contracts as a continuous viewpoint of how the service levels are being met on a daily, weekly, monthly, yearly basis.

Q132 Attachment M, Section 38. Please clarify CSAT & NPS score reporting. Is it being collected today and if so how.

R132 Customer Service Scores (CSAT) and Net Promoter Score (NPS) as a result of after-call and after-chat surveys deployed by the vendor.

Q133 Attachment M, Section 41. Please clarify data warehousing requirement.

R133 Vendor responsibility for warehousing data.

Q134 Attachment M, Section 45. Please define what is meant by Dynamic Integration Framework.

R134 Vendor ability to seamlessly integrate into preexisting and 3rd party systems as needed.

Q135 Attachment M, Section 46. Please clarify how many different dynamic menus on caller profile are used today.

R135 The College may discuss this information with shortlisted vendors.

Q136 Attachment M, Section 51. Please clarify what is meant by Fraud and Identity analytics.

R136 Tools to analyze existing and historical data to identify and minimize potential fraud.

Q137 Attachment M, Section 56. Please clarify the requirement of Interaction Journey Analytics.

R137 Ability to track and analyze customers at every stage of interaction in the contact center to define a journey of said interactions.

Q138 Attachment M, Section 58. Please clarify IVR self help reporting. Are you looking to understand who/quantity of people who were able to complete their call using IVR self help?

R138 Yes, as well as at what stage in the IVR were users able to resolve their case.

Q139 Attachment M, Section 60. Please clarify what is meant by knowledge management creation and support.

R139 Continuous vendor support to create, edit, and review knowledge-based articles for accuracy and clarity.

Q140 Attachment M, Section 65. Please clarify Limited Speech Recognition Languages.

R140 Vendor ability to use speech analytics to convert words into text in multiple languages.

Q141 Attachment M, Section 66. Please define which languages need to be supported for Multilingual Omnichannel Support.

R141 Spanish required, Creole and other languages preferred. College may discuss this information further with shortlisted vendors.

Q142 Attachment M, Section 70. Please clarify what is meant by new application and services enablement.

R142 Vendor ability to develop new applications and services that can be implemented to support contact center.

Q143 Attachment M, Section 74. Please clarify what is meant by Open Standards adoption and how is it different from #73 Open APIs.

R143 Open standards v. open source. Ability for vendor to accommodate both as needed.

Q144 Attachment M, Section 75. Please define Performance Management.

R144 Process in place for tracking and improving contact center team based on current and historical agent activity.

Q145 Attachment M, Section 77. Please clarify what is meant by predictive analytics.

R145 Using current and historical data to predict future workflows and customer trends.

Q146 Attachment M, Section 85. Please clarify what is meant by repeat caller analysis.

R146 Ability to define callers that have engaged with the contact center multiple times in a single day, week, or month for a single or multiple issue(s).

Q147 Attachment M, Section 91. Please clarify smart call routing, is this similar to skills based routing.

R147 Yes. Tools that automatically place customers in a skill-based queue based on need.

Q148 Attachment M, Section 94. Please clarify the Speech and text analytics requirement.

R148 Ability to use AI to listen to and analyze conversations, tone, and monitor agent performance to provide live automated support to agents such as suggestions for call resolution or service improvement.

Q149 Attachment M, Section 95. Please define which third party tools need to be integrated.

R149 TargetX and the College's homegrown Student Information System CID (College Integrated Database).

Q150 Attachment M, Section 97. Please Define what Broward College is looking to assess?

R150 Assessment of the speed and latency of IP networks and an assurance that the vendor can handle large call volumes with quality connections.

Q151 The RFP references Blackboard, Inc. as the current provider. Are you using their agent resources and the student management platform or just the agent services?

R151 The College is using agent resources and software tools.

Q152 Are you happy with the services you have received from Blackboard, Inc and are they invited to participate in this RFP?

R152 All responsible and responsive vendors that can provide contact center services as per the requirements of the solicitation document can submit reply to the ITN.

Q153 Are there any performance improvements you would like to see made?

R153 Yes. The College may discuss this information with shortlisted vendors.

Q154 What is your annual spend with the incumbent vendor?

R154 Varies and the College may discuss this information with shortlisted vendors.

Q155 What is your monthly and/or annual budget?

R155 Refer to R39.

Q156 Will you need additional language support beyond English?

R156 Yes.

Q157 Currently use in house system "CID" – wants to transition off. Salesforce as CRM – Please explain.

R157 The College is currently using a homegrown Student Information System (SIS) by the name of CID. TargetX is the CRM tool used for the recruitment suite. The College has interest in transitioning off CID in the coming years.

Q158 What is the current FCR rating and what is the targeted FCR?

R158 Refer to R17.

Q159 What are the current SLA's and is the current providers' performance.

R159 Refer to R14, R16, R17, and R29.

Q160 What self-services options are currently offered and by what channel?

R160 The College may discuss this information with shortlisted vendors.

Q161 Do you measure the FCR of self-service and if so, what is the rating?

R161 No.

Q162 What percentages of the current contact volume is resolved via self-service options?

R162 Information not available at this time.

Q163 Please define your understanding of a "white glove service model".

R163 Premium assistance that provides a high level of care, dedication, and attention to detail in servicing every single individual no matter how small or large the ask.

Q164 What are the current CSAT scores for the past 12 months?

R164 The College may discuss this information with shortlisted vendors.

Q165 What methods are used currently to gather CSAT data?

R165 After call and after chat surveys deployed by vendor agents handling interactions.

Q166 What percentage of the 230,000 contacts is phone, email and chat?

R166 The vast majority of interactions is phone. The College may discuss further information with shortlisted vendors.

Q167 Can you provide the last 12 months of contact volume overall by month?

R167 The College may discuss this information with shortlisted vendors.

Q168 Can you please provide contact arrival information by channel for the past 12 months, by the hours of ½ hour. A consolidated report is fine we do not need this information by month.

R168 The College may discuss this information with shortlisted vendors.

Q169 Will the CSR's have credentialed access to all Broward College systems listed in the RFP?

R169 No.

Q170 What is the average handling time for an interaction by transaction type, i.e., financial aid, Registration, admissions, helpdesk etc.?

R170 Refer to R29.

Q171 Are all staffed resources required to live in the state of Florida or is it just that the business has an operating presence in the state?

R171 Vendor must be able to conduct business in the state of Florida and must be on-shore.

Q172 The pricing sheet request per incident pricing. Are you open to other models such as per hour or a hybrid model?

R172 Refer to R6, R106, and R107.

Q173 How many FTE currently support the program with your current outsource provider.

R173 The College may discuss this information with shortlisted vendors.

Q174 Your RFP seems to be requesting both the human resources and management of those resources but also access to the Omni-channel platform we use to manage the contact center. Is this a correct interpretation? If so, how many on campus users of our CaaC platform do you expect to have?

R174 Yes. Campus user count may be discussed with shortlisted vendors based on product and costs.

Q175 If we have a D&B number but we do not have a credit rating with D&B will we meet the criteria of section 4.6.1. If not, does this automatically disqualify our organization?

R175 The College will assess the financial capacity of Respondent as established in SECTION 4.6.1 and allocate evaluation points accordingly. Reply will not be disqualified.

Q176 How many agents does Broward College, or the incumbent have on this program (steady state and to address peaks)?

R176 The College may discuss this information with shortlisted vendors.

Q177 We understand that Broward College currently has 24/7/365 support, does Broward College intend to keep these hours? If not, what will the hours of operation be for this program?

R177 Yes.

Q178 What is Broward College's length of training – number of hours?

R178 Information not available at this time.

Q179 Will Broward College provide the training curriculum/program?

R179 The College may discuss this information with shortlisted vendors.

Q180 Will Broward College provide a resource for training?

R180 The College may discuss this information with shortlisted vendors.

Q181 Is it acceptable to conduct training in a virtual environment?

R181 Yes.

Q182 Can the vendor hire remote agents for this program?

R182 Yes, as long as they are on-shore.

Q183 If the vendor hires remote agents, do the agents have to reside in the state of Florida or can they reside anywhere in the United States?

R183 Anywhere as long as they can conduct business in Florida and are on-shore.

Q184 We understand that Broward College's current contact center model offers support via phone, chat, and email – RFP mentions the new vendor is expected to offer phone and live chat support, is email support a part of the scope of service?

R184 Yes. Call and chat support will take up the vast majority of support but the vendor should be able to provide email support in certain cases.

Q185 Can you provide historical volume for all channels that will be serviced by the vendor – phone, chat, and email?

R185 Information not available at this time.

Q186 Can you please provide historical AHT for all channels that will be serviced by the vendor – phone, chat, and email?

R186 Information not available at this time.

Q187 Are there current SLAs/KPIs for this program?

R187 Yes.

Q188 What are the language requirements for this program?

R188 Spanish required, multilingual included Creole, preferred.

Q189 What specific background checks and/or drug screens are required of the staff?

R189 The College may discuss this information with shortlisted vendors.

Q190 What is going well with the program and where is there room for improvement?

R190 The College may discuss this information with shortlisted vendors.

Q191 What are the top goals for the chosen vendor to focus on?

R191 The College may discuss this information with shortlisted vendors.

Q192 Does Broward College have a focus on improved efficiency (lower AHT, higher FCR etc.)?

R192 Yes.

Q193 How satisfied are they with their current solution/supplier?

R193 The College may discuss this information with shortlisted vendors.

Q194 What is the area you are looking to transform the most?

R194 Efficient and effective customer service and support using a white-glove-service model. The College may discuss further information with shortlisted vendors.

Q195 Do you have issues with your current provider that you would like to avoid?

R195 The College may discuss this information with shortlisted vendors.

Q196 Can you share more specific call volume information, by month and during peak periods?

R196 Information not available at this time.

Q197 What hourly pricing model would you like provided? Payroll or production?

R197 Refer to ATTACHMENT B - PRICE RESPONSE FORM in the solicitation document.

Q198 What are the requested Payment Terms? (Ex. net 30, 45, 60).

R198 Refer to Clause 1 of ATTACHMENT C – SAMPLE CONTRACT.

Q199 How long is Nesting and is it to be assumed billable at training rate or production rate?

R199 The College may discuss this information with shortlisted vendors.

Q200 How long is training for the CSR's and is refresher training required? If so, how many hours?

Q200 The College may discuss this information with shortlisted vendors.

Q201 Is there additional support needed beyond Team Lead, QA, Trainer and Operations Manager? What are the required support ratios?

R201 The College may discuss this information with shortlisted vendors.

Q202 How many quality monitors are required per agent per month?

R202 Staffing levels will be required to be determined by the vendor. The College will work with selected vendor to determine staffing levels as needed.

Q203 What is the Average Handle Time by call type to be assumed for pricing?

R203 Refer to R29.

Q204 Are you looking for a B&M location or is Work from Home an option?

R204 Work from home is an option.

Q205 Can you please provide the Hours of Operation?

R205 24/7/365 support.

Q206 Do you have specific language needs?

R206 Refer to R188.

Q207 What are the agent background check requirements?

R207 The College may discuss this information with shortlisted vendors.

Q208 Can you provide chat volumes?

R208 Information not available at this time.

Q209 Can you elaborate on your DRP/BCP requirements? Are there specific requirements for cloud-based technologies for example.

R209 Vendor will have measures in place for a Business Continuity Plan and Disaster Recovery plan to ensure healthy operations and ability to pivot and adjust in times of disaster. This includes, but is not limited to sata backup procedures, communication plans, and regular training and testing of the DRP plan in the event of an emergency or disaster.

Q210 What are the minimum desktop requirements for CPU, RAM, and Memory (if any)?

R210 Information not available at this time.

Q211 Are dual monitors required?

R211 No.

Q212 Are your provided apps compatible with Windows10?

R212 Yes.

Q213 Please describe the anticipated call flow for voice delivery.

R213 The College may discuss this information with shortlisted vendors.

Q214 What is the system of record for CRM?

R214 Refer to ATTACHMENT A – SCOPE OF SERVICES.

Q215 How are your applications be accessed (web-based, VDI, local install, etc.)?

R215 Web based integrations.

Q216 What applications will the vendor (Alorica) be providing?

R216 The College may discuss this information with shortlisted vendors, as information is not available at this time.

Q217 Will vendor provide the Workforce Management tool?

R217 Yes.

Q218 How will vendor agents authenticate to your provided platforms?

R218 The College uses Single Sign On (SSO) for authentication.

Q219 Is multifactor authentication required? If so, please describe the 2nd factor.

R219 Refer to R218.

Q220 Will agents be exposed to full credit card or bank account numbers?

R220 No.

Q221 Will private connectivity between you and vendor be required?

R221 Secured connectivity in dealing with any sensitive student information is required.

Q222 Will you deliver private circuits to 2 separate Alorica datacenters?

R222 The College may discuss this information with shortlisted vendors.

Q223 Is IPSEC connectivity for VPN tunnels acceptable? If so, do you support VTIs?

R223 Yes and yes.

Q224 Please describe networking or security requirements.

R224 The College may discuss this information with shortlisted vendors.

Q225 What is the anticipated bandwidth per seat (typically 150-250kbps per seat)?

R225 Information not available at this time.

Q226 What platforms and tools will be provided by clients for agents to support their customers?

R226 While integration into systems at the College may be an option (i.e. TargetX), vendors should be prepared to support customers through their own platforms and tools.

Q227 Will the Supplier need to provide any customer facing channels or tools?

R227 Yes. Vendor will be able to provide live chat and telephony tools for agents to assist customers.

Q228 Please explain the efforts to date to provide automation on the Voice and Chat channels and efforts to use the Existing Knowledge Management systems to help automate frequently asked questions.

R228 To name a few, IVR self-help options, automated Financial Aid tracking and Financial Aid status tools, deployment of a chatbot on public facing websites.

Q229 Please explain how the agents are using the Knowledge Management system today, and plans to evolve the Knowledge Management system to be ready when the new CCaaS system would go live.

R229 The College may discuss this information with shortlisted vendors.

Q230 What are the thoughts on using SMS as a channel to communicate with students and recruits?

R230 The College is open to exploring the topic.

Q231 What are the thoughts on using social channels to communication with students and recruits?

R231 Refer to R230.

Q232 The TAB numbering in the “Reply Organization Format and Submittal Checklist” isn’t the same as the numbering format for the ITN document. Which one should bidders follow?

R232 Please utilize the tab numbering format in SECTION 4 – SUBMITTAL REQUIREMENTS, with section dividers from TAB 1 to TAB 12.

4. ATTACHMENTS

None.

Addenda should be returned with the response. Failure to do so may disqualify your response. Please sign below to verify that you have read and understand this addendum.

Anthony R. Humphreys Anthony R. Humphreys
Signature and Print Name

President
Title

BlackBeltHelp LLC
Company Name

09/10/2023
Date

“Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under chapter 120, Florida Statutes.”

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

TAB 3

W-9 FORM

Form W-9 (Rev. October 2018) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification ▶ Go to www.irs.gov/FormW9 for instructions and the latest information.	Give Form to the requester. Do not send to the IRS.
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Print or type. See Specific instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. BlackBeltHelp LLC	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ S <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶	
	5 Address (number, street, and apt. or suite no.) See instructions. 936 SW 1st Ave, Suite 412	Requester's name and address (optional)
	6 City, state, and ZIP code Miami, FL 33130	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
OR										
Employer identification number										
8	2	-	5	2	8	1	8	6	3	

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶ <i>www.chipm</i>	Date ▶ 01-07-2022
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

NOTICE PROVISION

Following contract award, when any of the parties desire to give notice to the other, such notice must be in writing, sent by U.S. Mail, postage prepaid, addressed to the party for whom it is intended at the place last specified; the place for giving notice shall remain such until it is changed by written notice in compliance with the provisions of the paragraph.

This information must be submitted with the reply or within three (3) days of request. For the present, the parties designate the following as the respective places for giving notice:

To College: Zaida Riollano, Procurement Manager
Procurement Services Department – 2nd Floor
6400 NW 6th Way
Fort Lauderdale, FL 33309

With Copy To Office of the General Counsel
(College): 111 East Las Olas Boulevard – Room 523
Fort Lauderdale, FL 33301

With Copy To: Torey Brignolo, Senior Director, Contact Center Operations
(College Contract 3501 SW Davie Road
Administrator) Davie, FL 33314

Response: This is acknowledged and BlackBeltHelp will comply. Please refer to below details.

To Respondent: BlackBeltHelp Headquarters
936 SW 1st Ave., Suite 412
Miami, Florida 33130

With Copy To Same as above
(Respondent):

VENDOR CONFLICT OF INTEREST FORM – ATTACHMENT I

**BROWARD COLLEGE | ITN-2023-055-TP
VENDOR CONFLICT OF INTEREST FORM | ATTACHMENT I**

VENDOR CONFLICT OF INTEREST: The award of this solicitation is subject to the provisions of Chapter 112, Florida Statutes, as currently enacted or as amended from time to time. All respondents must disclose with their reply the name of any officer, director or agent who is also an employee of the College. All respondents must disclose in their response the name of any officer, director, employee or agent of company who is also an employee of College or an immediate family member of an employee of College. If there are none, check NO below.

Have Conflict of Interest: **YES** or **NO** (check)

YES NO

If YES, please explain below:

RESPONDENT'S COMPANY NAME: BlackBeltHelp LLC

Print Name and Title: Anthony R. Humphreys, President

Signature: *Anthony R. Humphreys*

LITIGATION HISTORY

State whether any team member has been involved in any services related litigation, action or claim of projects of same or similar size, including but not limited to any action against or by any owner, whether active, pending, or concluded, at the mediation, arbitration, trial or appellate level, within five years preceding the submission of this submittal. For each instance include the following information:

- a. the style/caption of the matter
- b. the case number
- c. the forum/venue of the action
- d. a description of the claim, action, or litigation
- e. evidence of satisfactory resolution of the claim, action, or litigation by affirming or providing documentary evidence that a final judgment has been rendered in favor of the company or any final judgment rendered against the company is satisfied within 90 days of the date that the judgment becomes final.

If “NO” litigation or regulatory action has been filed against your company(s), please provide a statement to that effect.

For joint venture or team replies, submit the requested information for each member of the joint venture or team. For companies with a parent or holding company or related subsidiary, submit requested information for all parties

Response: No, there has been no litigation, action, or claim against BlackBeltHelp related to projects of similar size within the five years preceding the submission of this submittal. We have not been involved in any legal disputes or actions, including mediation, arbitration, trial, or appellate proceedings, nor have there been any actions against or by any owners in this regard. Our company has a clean litigation history.

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

LETTER OF INSURABILITY

Response: Please refer to the letter of insurability below and kindly note that we can increase the insured amount as and when required with our insurance vendor.

LETTER OF INSURABILITY**To,****Date: September 14, 2023****Broward College,
111 East Las Olas Blvd,
Fort Lauderdale, FL 33301****Subject: Confirmation of extending coverage of insurance to the Broward College**

Dear Sir/Ma'am,

Phillips Bros. Insurance Agency ("Phillips") is the insurance broker to provides commercial insurance for businesses to mitigate business risk exposures. BlackBeltHelp LLC ("BBH") is one of our clients who has been offered insurance coverages.

We would like to certify that in the event of successful award of Request for Proposal ("RFP") to the BBH by Broward College, the Broward College will be insured for the benefits described in the abovementioned insurance policy number. Provided the coverage will only be applicable for the period during which this RPF remains effective. Following are the coverage limits placed on the amount of coverage offered to the Broward College:

a. Commercial General Liability:

- Each Occurrence \$1,000,000
- Personal & Adv Injury \$1,000,000
- General Aggregate \$2,000,000
- Products – Completed Operations \$2,000,000

b. Automobile Liability Insurance \$1,000,000

(If commercial autos will be used, including owned, non-owned and hired vehicles)

c. Umbrella Liability

- Each Occurrence \$5,000,000
- Aggregate: \$5,000,000

d. Professional Liability

- Per Occurrence \$1,000,000
- General Aggregate \$2,000,000

Kind Regards,



Charles K Phillips
Managing Partner
09/14/2023

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

MINIMUM ELIGIBILITY CRITERIA

TAB 4

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

REQUIRED RESPONSE FORM

SECTION 1 - REQUIRED RESPONSE FORM

ITN #: ITN-2023-055-TP	ITN TITLE: CONTACT CENTER SERVICES			RELEASE DATE: MON 08/14/2023
DUE DATE: MON 10/02/2023	TIME DUE - AT OR BEFORE: 2:30 p.m. ET	NUMBER OF REPLY COPIES REQUIRED: →	ORIGINALS: One (1) Original Electronic Copy	The College uses E-Bidding and will only accept electronic submittals via DemandStar at www.demandstar.com . Complete Electronic Copy of Reply must be in a single Adobe PDF File .

All replies shall include this REQUIRED RESPONSE FORM fully executed. Reply must contain all information required to be included in the reply as described herein. Respondents are encouraged to schedule additional time for upload of reply documents due to online procedures. Replies received after the date and time due will not be considered.

RESPONDENT'S INFORMATION

Respondent's Name: BlackBeltHelp LLC
 Street Address: 936 SW 1st Ave., Suite 412
 City and State: Miami, Florida - 33130
 Respondent Telephone: 8442552358 Respondent Fax: _____
 Respondent Toll Free: _____
 Contact Person: Anthony R. Humphreys
 Contact Person's Address: Miami, Florida - 33130
 Contact Telephone: 703.864.3559 Contact Fax: _____
 Contact Toll Free: _____
 Internet E-mail Address: anthony_humphreys@blackbelthelp.com Internet URL: _____
 Respondent Taxpayer Identification Number: 82-5281863

How were you informed of this solicitation? (Please provide media name(s) in blank space):
 Website: RFPMart Newspaper: _____ Other: _____

REPLY CERTIFICATION

I hereby certify that I am submitting the following information as my company's (Respondent) reply and I am authorized by the Respondent to do so; the Respondent agrees to complete an unconditional acceptance of the contents of this document inclusive of this Invitation to Negotiate (ITN), and all attachments, exhibits, and appendices and the contents of any Addenda released hereto; the Respondent agrees to be bound to any and all specifications, terms, and conditions contained in the solicitation, and any released Addenda and understand that the following are requirements of this solicitation and failure to comply may result in disqualification of reply submitted; the Respondent has not divulged, discussed, or compared the reply with other respondents and has not colluded with any other respondent or party to any other reply; the Respondent acknowledges that all information contained herein is part of the public domain as defined by the State of Florida Sunshine and Public Records Laws; and that all responses, data, and information contained in this reply are true and accurate.

Anthony R. Humphreys 09/01/2023
 Signature of Respondent's Authorized Principal Date
 Anthony R. Humphreys President
 Name of Respondent's Authorized Principal Title of Respondent's Authorized Principal

NOTE: Entries must be completed in ink or typewritten. This original Required Response Form must be fully executed and submitted with this ITN Submission.

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

TAB 5

EXPERINECE AND LICENSES

Respondent must demonstrate a strong documented track record of current engagement in providing the products and services detailed in ATTACHMENT A – SCOPE OF SERVICES, for three continuous years or more, within the last five years.

Respondent must submit all active business licenses, registrations, and certifications as applicable; documenting Respondent is fully licensed to conduct relevant business in the State of Florida.

Occupational/business licenses are required as applicable. Subcontractor(s) licenses may be required.

Response: BlackBeltHelp has been continuously and successfully providing the requested services to over 200 higher education institutions for over 17 years. BlackBeltHelp is a leading provider of Call Center Services in higher education that includes a scalable business model that focuses on timely responsiveness, outreach, and world-class customer service. BlackBeltHelp ensures that the Call Center Services provided will result in increased student satisfaction due to the use of a robust quality assurance model that provides consistent feedback to improve the student experience. BlackBeltHelp is a pioneer in answering incoming calls, web chats, emails, constituent-initiated ticket system requests, automating issue resolution through AI-powered Chatbots, and providing robust and comprehensive reports related to all interactions at appropriate intervals.

We have a record of success with our OneStop Student and IT Helpdesk Services. Also, below is a sample of the work that we are doing at over 200 higher education systems, including:

- Pasadena City College
- Pima Community College
- California Community College System
- University of West Alabama
- The City College of San Francisco

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

Please find below our business registration certificate to conduct relevant business in the State of Florida:

State of Florida Department of State

I certify from the records of this office that BLACKBELTHELP, LLC is a Delaware limited liability company authorized to transact business in the State of Florida, qualified on May 13, 2022.


The document number of this limited liability company is M22000007556.

I further certify that said limited liability company has paid all fees due this office through December 31, 2023, that its most recent annual report was filed on April 25, 2023, and that its status is active.

I further certify that said limited liability company has not filed a Certificate of Withdrawal.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Twenty-fifth day of April, 2023*




Secretary of State

Tracking Number: 6971512502CC

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

EXPERIENCE AND QUALIFICATIONS

TAB 6

EXECUTIVE SUMMARY

Submit a brief summary, of no more than three pages, stating the Respondent’s interest in the contract; overview of company qualifications; names, contact information and qualifications of key staff; understanding of the nature and scope of the services to be provided; and Respondent’s ability to comply with all requirements of contract.

Discuss your company’s experience in providing contact center services.

The Respondent shall explain in detail why Respondent is interested and why company would be the best choice for the College. In the event the Respondent is a joint venture, the Respondent shall list the use of Subcontractors, if any.

Response: BlackBeltHelp is higher education’s #1 AI-powered Contact-Center-as-a-Service provider for students, faculty, and staff. Our solutions are designed to help higher education institutions unify all their applications into a single, easy-to-navigate, analytics-powered dashboard that drives institutional processes and improves the user experience. Our integrated, omnichannel platform – Simplify, will empower Broward College to integrate disparate systems across campus to provide a simple yet powerful student services tool that increases institutional efficiency and helps achieve engagement objectives.

We enable your institution to deliver a consistent end-user experience by centralizing service requests. We expand the service hours to accommodate your end-user’s diverse needs and reduce response times. Our highly trained customer service staff manages your end-user’s inquiries leveraging **multi-modal responsiveness, AI-powered resources, and knowledge-based capabilities**. This ensures that BlackBeltHelp is fully capable of meeting all the requirements stipulated in the contract.

Please refer to the following list of key personnel who will be servicing the College:

Name	Experience
<p style="text-align: center;">Anthony R. Humphreys President anthony_humphreys@blackbelthelp.com</p>	<p>30+ years of Student Service and Customer Engagement. A seasoned professional in customer relationship management, service delivery, business process management, and process excellence. Anthony served as Financial Aid Director and VP of Students for many years at community colleges and 4-year private colleges.</p> <ul style="list-style-type: none"> • Responsible for creating, communicating, and implementing the organization’s vision, mission, and overall direction • Responsible for taking managerial decisions and strategic planning • Responsible for supervising and control all strategic and business aspects of the company • Create and maintain relationships with industry leaders
<p style="text-align: center;">Manish Gambhir Chief Operating Officer manish_gambhir@blackbelthelp.com</p>	<p>With 30 years of experience, he oversees the company’s overall business operations for BlackBeltHelp including training, quality control, data analysis, and client reporting. Before joining BlackBeltHelp, he worked with Wipro, Barclays, Granton, and Nam Advertising.</p> <ul style="list-style-type: none"> • Responsible for budgetary considerations, as well as the operational and financial health of the organization

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

	<ul style="list-style-type: none"> • Responsible for goal-setting and directing the operations of the company • Resource Planning • Oversees the Service Delivery operations, including <ul style="list-style-type: none"> ○ Training ○ Quality control ○ Data analysis
<p style="text-align: center;">Tye Reed VP Customer Success tye_reed@blackbelthelp.com</p>	<p>With 24 years of experience in contact center management, I am a proactive and innovative professional skilled in operations, program start-ups, process improvements, client services, leadership development, sales, training, and recruiting. In my role as Director of Customer Success at TELUS International, I have successfully managed and developed dedicated accounts with a strong focus on enhancing customer experience and building lasting client partnerships. I hold a Bachelor of Science in Human Resources Management and am certified in Six Sigma and COPC, underscoring my commitment to delivering exceptional results in contact center operations.</p>
<p style="text-align: center;">Joel Turpin Strategic Customer Success Manager joel_turpin@blackbelthelp.com</p>	<p>15+ years of experience in customer relationship management, working with higher education institutions. Joel has worked with numerous institutions in partnership for student services initiatives, including 2-year, 4-year public, and 4-year private, both small and large. He has experience in full lifecycle partnership management, from marketing and enrollment, OneStop support, and IT Help Desk.</p> <ul style="list-style-type: none"> • Initial-point client relationship manager. Will serve as your day-to-day point of contact and point of escalation. • Will provide data-driven feedback and recommendations on process improvement opportunities
<p style="text-align: center;">Robin Morgan AVP Customer Success robin_morgan@blackbelthelp.com</p>	<p>Robin has 12 years of client relationship management experience in the education industry. He is known for building and preserving a trusting relationship with our clients. He will be responsible for the following:</p> <ul style="list-style-type: none"> • Day to Day operational responsibility • Daily POC • Reporting/daily hand-offs

We have successfully done this before

BlackBeltHelp has been continuously and successfully providing the requested services to over **200 clients** in Higher Education for over **17 years**. BlackBeltHelp's clients range from the nation's largest Community College systems, such as **California Community College**, which includes **Pasadena City College** and **The City College of San Francisco**, to large community colleges, such as **Pima Community College**, to many more colleges and universities located across the United States.

We have over **400 full-time employees**, handling over **1 million support requests** per year from approximately **4 million users** distributed across our clients. They have excellent verbal and written communication as well as emotional skills. Additionally, we provide support in both English and Spanish.

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

Company Values at BlackBeltHelp

1. **Client-Centric Innovation:** We are committed to continuously innovating our solutions and services, putting our clients at the forefront. We strive to understand their unique needs and develop tailored support systems that drive success.
2. **Excellence in Expertise:** We value expertise and excellence in all that we do. Our team comprises industry veterans and skilled professionals dedicated to providing top-tier support and guidance.
3. **Cutting-Edge Technology:** We embrace cutting-edge technology to stay ahead of industry trends. Our commitment to innovation allows us to deliver state-of-the-art support solutions that transform the education industry.
4. **Empowering Partnerships:** We foster strong partnerships with educational institutions, working collaboratively to achieve shared goals. Our aim is to empower our partners with the tools and knowledge needed to excel.
5. **Unwavering Integrity:** Integrity is the foundation of our operations. We conduct business with transparency, honesty, and ethical practices, ensuring trust and reliability in all our interactions.
6. **Student-Centric Approach:** We prioritize the student experience, understanding that their success is our ultimate goal. Our solutions are designed to enhance the educational journey and support student achievement.
7. **Adaptability and Flexibility:** We are agile and adaptable, ready to respond to the evolving needs of educational institutions. Our flexible solutions ensure that we can meet unique challenges head-on.
8. **Diversity and Inclusion:** We celebrate diversity and foster an inclusive work culture where all voices are heard and valued. Our diverse team enriches our perspectives and drives creativity.
9. **Continuous Improvement:** We believe in constant improvement, regularly seeking feedback and refining our offerings. This commitment to growth ensures that we remain at the forefront of the industry.

These values guide our actions and decisions at BlackBeltHelp, shaping our commitment to delivering exceptional support solutions to the education sector and beyond. We aim to build a mutually beneficial, long-term relationship with Broward College. We strongly believe that BlackBeltHelp would be the best choice for Broward College, and you will benefit from partnering with BlackBeltHelp because:

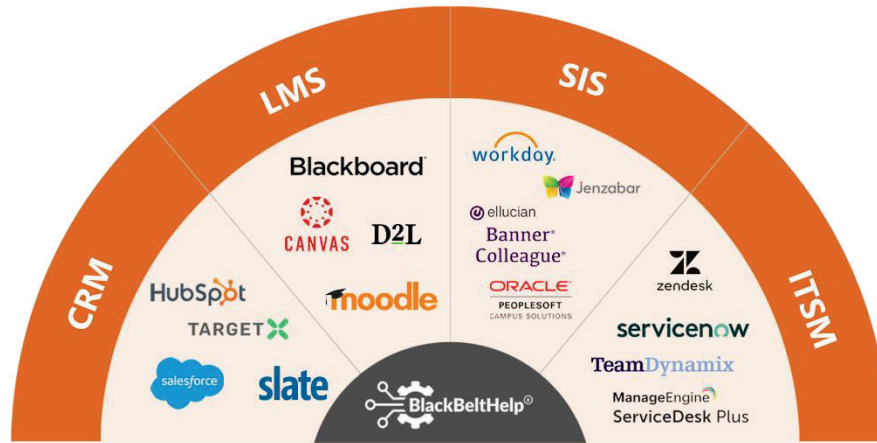
We do it differently

Due to the proliferation of advanced communication platforms that deliver a single-point solution, BlackBeltHelp has designed an open omnichannel integration platform to streamline student engagement across the campus. **SIMPLIFY** works with existing enterprise applications to provide personalized information to students in whatever mode of communication the student and institution prefer. We've built this tool based on our years of experience providing live OneStop and IT support.

SIMPLIFY can be utilized to provide live and automated AI-assisted support to students via chat, phone, email, and messaging. While our AI chat and voice bot are components of **SIMPLIFY**, the platform also includes Engagement Messenger, Advisor Desktop, and self-service tools, all powered by integrated data, AI, and process automation. Best of all, **SIMPLIFY** doesn't restrict what applications or systems can be connected.

Using a single student communication platform allows an institution to reduce administrative costs, increase employee efficiency and improve student satisfaction. As engagement technology advances, **SIMPLIFY** is also designed to incorporate third-party tools and contact center software.

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP



Seamlessly Integrated Ecosystem

We will save you money

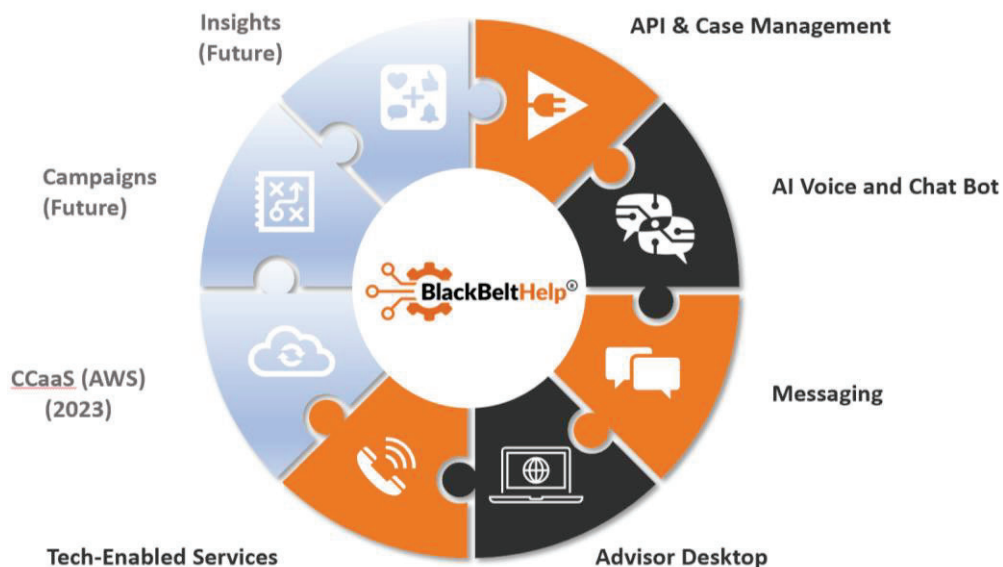
We firmly believe that when Broward College partners with BlackBeltHelp for the services requested in the RFP, it will achieve a similar **30-40% savings** realized by other institutions after leveraging BlackBeltHelp's Call Center Services.

BlackBeltHelp attributes the following ways to drive down costs for Broward College:

- Effective first-call resolution
- Optimize the total number of interactions
- Adopt customized technology and tools
- Self-help tools
- AI chat/voice bot

We will add value

BlackBeltHelp is more than just a vendor to resolve user issues. We believe in adding value to our partner institutions, which drives us to evolve and continuously improve. Hence BlackBeltHelp has a lot to offer to Broward College:



ORGANIZATIONAL PROFILE

Identify the prime Respondent responsible for all portions of this solicitation. Include:

a. State current company name, address, telephone number, fax number, and under what other or former name(s) the Respondent is currently operating or has operated under.

Response:

Company Name	BlackBeltHelp, LLC
Address	936 SW 1st Ave., Suite 412, Miami, Florida 33130
Telephone Number	(844) 255-2358 Ext. 511
Fax Number	NA
Former Name	NA

b. Contact information including Principal’s name, telephone number, and email address.

Response:

Principal’s Name	Anthony R. Humphreys
Telephone Number	703-864-3559
Email Address	anthony_humphreys@blackbelthelp.com

c. Size of organization.

Response: BlackBeltHelp is **solely focused on Higher Education** that and operates with a dedicated team of more than **400 full-time professionals**, strategically located across the United States. Annually, we manage an impressive workload of over **1 million support requests**, catering to the diverse needs of approximately **4 million users**, which includes students, staff and faculty within our client network. Our commitment to the Higher Education sector is evident through our partnerships with over **200 clients**, where we successfully facilitate an astonishing **1.3 million plus interactions** each year.

d. Number of years established in business, include operation under other company names, providing services same or similar as described herein.

Response: We at BlackBeltHelp have been operating in this industry for 17 years, offering the same services as the ones listed in this RFP. Our dedication to providing excellent service, and our vast experience in the field, enables us to operate successfully under our current company name without requiring any other business identities.

e. Number of years in business in the State of Florida.

Response: We have been conducting business in the state of Florida for the past 10 years.

f. Resumes of individuals that will have direct role in performance and supervision of this engagement.

Response: Please refer to the following list of key personnel who will have direct role in the performance and supervision of this engagement:

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

Name	Experience
<p>Anthony R. Humphreys President</p>	<p>30+ years of Student Service and Customer Engagement. A seasoned professional in customer relationship management, service delivery, business process management, and process excellence. Anthony has served as Financial Aid Director and VP of Students for many years at community colleges and 4-year private colleges.</p> <ul style="list-style-type: none"> • Responsible for creating, communicating, and implementing the organization’s vision, mission, and overall direction • Responsible for taking managerial decisions and strategic planning • Responsible for supervising and control all strategic and business aspects of the company • Create and maintain relationships with industry leaders
<p>Manish Gambhir Chief Operating Officer</p>	<p>With 30 years of experience, he oversees the company’s overall business operations for BlackBeltHelp including training, quality control, data analysis, and client reporting. Before joining BlackBeltHelp, he worked with Wipro, Barclays, Granton, and Nam Advertising.</p> <ul style="list-style-type: none"> • Responsible for budgetary considerations, as well as the operational and financial health of the organization • Responsible for goal-setting and directing the operations of the company • Resource Planning • Oversees the Service Delivery operations, including: <ul style="list-style-type: none"> ○ Training ○ Quality control ○ Data analysis
<p>Robin Morgan AVP Customer Success</p>	<p>Robin has 12 years of client relationship management experience in the education industry. He is known for building and preserving a trusting relationship with our clients. He will be responsible for the following:</p> <ul style="list-style-type: none"> • Day to Day operational responsibility • Daily POC • Reporting/daily hand-offs

g. Profile of local (Miami-Dade, Broward or Palm Beach) account representative(s), direct project staff, and their training and applicable experience.

Response: BlackBeltHelp, LLC has its headquarters in Miami, FL, and is located at: 936 SW 1st Ave., Suite 412, Miami, Florida 33130. The entire BlackBeltHelp team is available to Broward College, and a local contact at our executive office will be provided. Here's a profile of our local account representative(s) and direct project staff based in Miami:

Local Account Representative:

- **Location:** Miami, Florida
- **Responsibilities:** As the local account representative, he/she will serve as the primary point of contact for our clients in the Miami-Dade, Broward, and Palm Beach areas. Their responsibilities include understanding client needs, ensuring smooth project implementation, and addressing any concerns or inquiries.

Direct Project Staff:

- **Location:** Miami, Florida

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

• Training and Experience:

- They have extensive experience in contact center operations and customer support.
- They have received specialized training in project management and client engagement.
- They are well-versed in our contact center solutions and processes.

Applicable Experience:

- Our local team in Miami has a deep understanding of the local education landscape and the unique challenges and opportunities it presents. They are capable of successfully managing projects for educational institutions in the region with similar scope of support as required for Broward College.

Training:

- Our direct project staff undergo regular training to stay updated on the latest industry trends, technology advancements, and best practices in customer support and contact center management.

Additional Information:

- BlackBeltHelp operates 24/7/365 contact centers from various locations, including Miami. In addition to our headquarters in Miami, Florida, we have work-from-home operations in Chicago, IL, Cleveland, OH, Somerset, KY, and Sacramento, CA.
- Currently, a few of our agents are working from home in Miami, and they will play a vital role in ensuring the success of the project in the local area.

We are committed to providing dedicated and experienced professionals to support our clients and deliver exceptional service.

h. Listing of recent projects which are same or similar to the requirements and scope listed in this solicitation, preferably for higher education or public-sector clients. (Please list projects only, i.e., projects that correspond with and can be verified via references requested)

Response: Please find below three project references from the higher education sector with similar requirements and scope as listed in this solicitation. Please feel free to reach out to the below-mentioned references:

PROJECT NAME	The City College of San Francisco
LOCATION	7201 Rossville Blvd, Baltimore, MD 21237
OWNER NAME AND TITLE	Ellen Rayz, Associate Vice Chancellor, and Chief Technology Officer
TELEPHONE AND EMAIL ADDRESS	(415) 239-3016; erayz@ccsf.edu
PROJECT DESCRIPTION	24x7 Student Services Call Center
METHOD OF DELIVERY	Phone, Chat, Email, and Chatbot
YEAR COMPLETED	Active engagement for over 3 years now

PROJECT NAME	Collin County Community College
LOCATION	3452 Spur 399 W, McKinney, TX 75069, USA
OWNER NAME AND TITLE	Jennifer McDermott, Director of Technology Support
TELEPHONE AND EMAIL ADDRESS	972-758-3854; jmcdermott@collin.edu
PROJECT DESCRIPTION	24x7 Student Services Call Center
METHOD OF DELIVERY	Phone, Chat, and Email
YEAR COMPLETED	Active engagement for over 6 years now

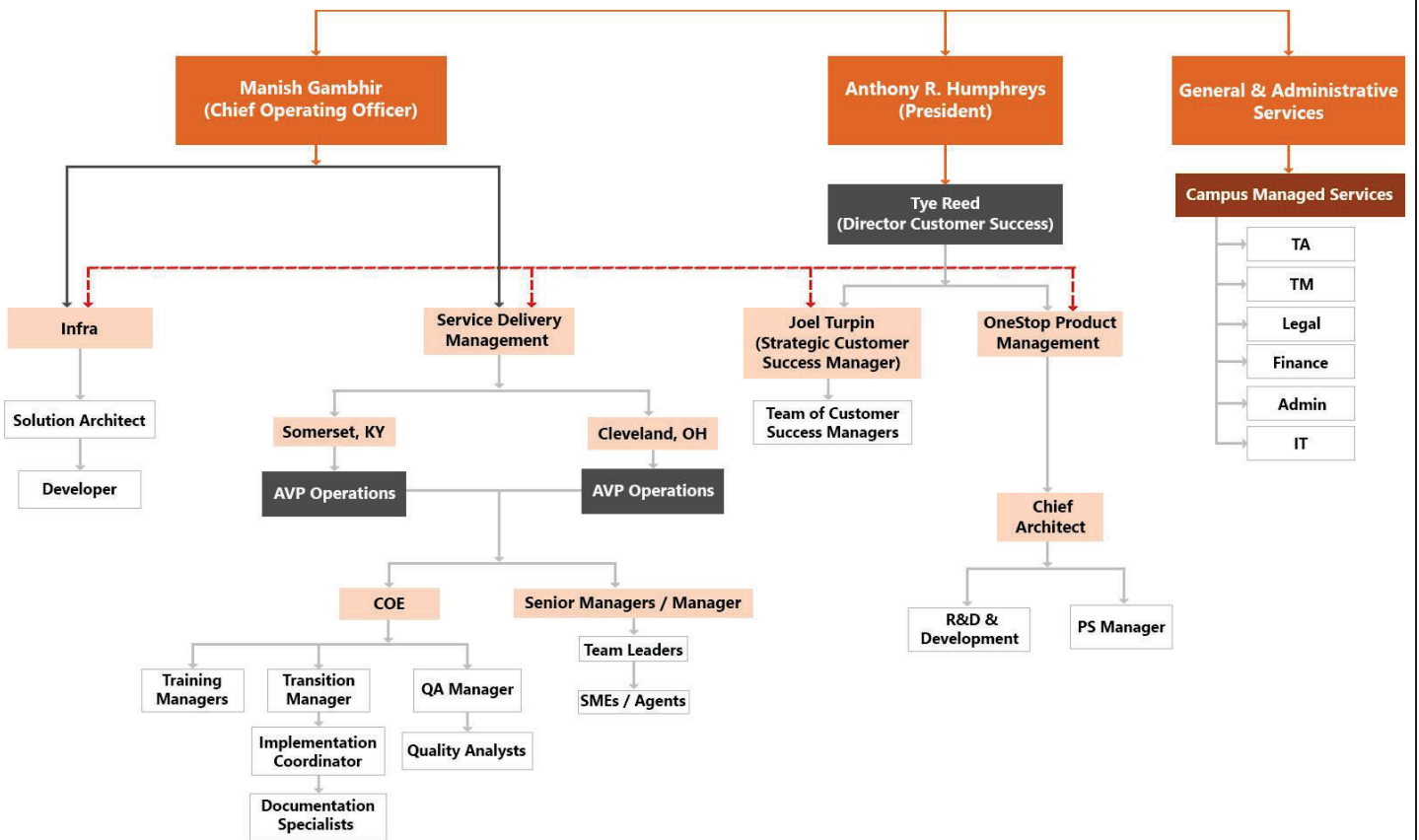
BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

PROJECT NAME	Pasadena City College
LOCATION	1570 E Colorado Blvd, Pasadena, CA 91106
OWNER NAME AND TITLE	Myriam Altounji, Dean of Enrollment Services
TELEPHONE AND EMAIL ADDRESS	(626) 585-7012; mmaltounji@pasadena.edu
PROJECT DESCRIPTION	24x7 Student Services Call Center
METHOD OF DELIVERY	Phone, Chat, Email, and Chat/Voice Bot
YEAR COMPLETED	Active engagement for over 4 years now

ACCOUNT MANAGEMENT AND STAFFING

Include organizational chart with local, district, and corporate levels for Respondent. Describe how the organizational structure will ensure orderly communications, distribution of information, effective coordination of activities, resource management, accountability, and decision-making authority. Describe the designated team representatives who are technically competent to assist the College in all activities associated with the service and maintenance of this account.

Response: Please refer to our organizational chart with local, district and corporate levels of respondents:



BlackBeltHelp will assign a dedicated Customer Success/Account Manager for Broward College who will directly report to the Director of Customer Success. He/She will ensure orderly communications, distribution of information and effective coordination of activities is maintained with Broward College. The Account Manager, through their

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

regular meetings with the College will ensure that the support services are running smoothly, He/She will share regular reports with the College presenting the overall performance of the support. The workforce management team, under the guidance of our COO, will ensure the required availability of resources to support Broward College. Accountability from BlackBeltHelp lies with all the stakeholders in the process. Your Account Manager will keep track of the overall performance of the support provided. Everyone reports to the President of the Company and the COO. This leadership has the final decision-making authority.

BlackBeltHelp will provide Broward College with dedicated resources. These resources will include agents/advisors who will answer user queries, the agents will have a team supervisor, and a team manager that every day will ensure that Broward College is receiving the desired delivery of support. There will be another team that will be comprised of Quality Managers who will monitor each and every support interaction.

The dedicated team that will be assigned to Broward College will be comprised of members that have already worked in the industry, and have the necessary skill set to provide support for various user issues like FA, Adm, RR also IT and LMS. The agents will go through necessary certifications such as FERPA to be able to communicate effectively to users from the College.

PERFORMANCE EVALUATION SURVEY FORM (REFERENCES) – ATTACHMENT J

All Respondents providing a response to this solicitation shall have their clients submit directly to the College via email as indicated below, a completed PERFORMANCE EVALUATION SURVEY FORM (ATTACHMENT J) in PDF format. All forms must be received from your clients directly by the College by the due date as stated in SECTION 1 – REQUIRED RESPONSE FORM by 2:30 p.m. ET or through an addendum and/or change of calendar date in our website.

At least three related PERFORMANCE EVALUATION SURVEY FORMS (ATTACHMENT J), preferably higher education clients, are required to be considered for the maximum solicitation points. If the College receives less than three completed forms directly from your client, points will be proportionally reduced.

Respondents must have their clients utilize the referenced Attachment for the reference’s information/response. References shall be from clients who have performed (or are currently performing) work, similar in nature and size, as the scope described herein within the five years prior to the solicitation due date.

Response: This is acknowledged and BlackBeltHelp will comply. Please refer to below details OF Higher Education Clients:

- Pima Community College
- Pasadena City College
- City College of San Francisco
- Collin County Community College
- The University of Texas Rio Grande Valley

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SCOPE OF SERVICES AND METHODOLOGY

TAB 7

PROPOSED SOLUTION

Respondent must provide a clear and detailed narrative addressing their ability to provide the services listed and how the Respondent will accomplish the scope of services stated in ATTACHMENT A – SCOPE OF SERVICES. The College will also consider information provided in the responses from references when evaluating this section.

Response: BlackBeltHelp's primary line of business is providing Call Center as a Service and AI-powered Student Experience solutions to colleges and universities. We have provided the requested services for over 17 years to 200 higher education clients. We have the credentials, references, and a record of accomplishment to successfully continue delivering Student Services.

We utilize standard Information Technology Infrastructure Library (ITIL) industry framework and methodologies to deliver high-quality Call Center. This helps us to deliver a high-quality experience for every remote interaction with a client, as we utilize an industry proven ticketing tool for call logging and escalations that happen seamlessly with customer updates. Additionally, integrated into the tool are customer customizations, Service Level Agreements (SLAs) and Operational Level Agreements (OLAs) within the departments aptly supported.

Our Contact Center Suite is a simple yet powerful platform that efficiently manages incoming/outgoing calls to departments and other groups, optimizes contact center operations and increases customer satisfaction. Resulting benefits to partner institutions include:

- Efficiently handling and directing calls
- Creating multi-site contact centers that work as one
- Communicating with customers on their terms
- Empowering agents to provide superior service
- Managing a better contact center with data-driven insights
- Record, Store, and Playback functionalities

BlackBeltHelp has also designed an open omni-channel integration platform to streamline student engagement across the campus. **SIMPLIFY** works with existing enterprise applications to deliver personalized information to students in

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whatever mode of communication the student and/or institution prefers. We've built this tool based on our years of experience in providing live OneStop Student Services and IT support.

SIMPLIFY can be utilized to provide live and automated AI-assisted support to students via chat, phone, email and messaging. While our chat and voice bot are a component of **SIMPLIFY**, the platform also includes our engagement messenger, Advisor Desktop, and self-service tools, all of which are powered by integrated data, AI, and process automation. Best of all, **SIMPLIFY** doesn't restrict what applications or systems can be connected.

Using a single student communication platform will allow Broward College to reduce administrative costs, increase employee efficiency and improve student satisfaction. As engagement technology advances, **SIMPLIFY** is designed to incorporate third-party tools and contact center software.

We strive to provide quality services to our clients, which has resulted in the development of industry leading service frameworks and best practices for IT service management (ITSM) which help to ensure a consistent high-quality experience.

PROPOSED METHODOLOGY

Describe in detail how Respondent will accomplish the proposed solution(s) identified above in order to complete required services. At a minimum, reply must include and provide detailed responses to the following:

Respondent's Procedures - Provide procedures for completing work required and how the procedures will be applied or modified to comply with requirements of this solicitation.

Response: **Our onboarding process and overall implementation strategy has been tested with over 100 of our higher education clients.** BlackBeltHelp's start-up philosophy and transition process is a carefully thought out plan through which we ensure that your current business processes are transferred to us using your existing processes along with our best practices.

We will begin with a Kick-Off meeting in which we will assign a dedicated **Implementation Manager** and **Project Manager** to Broward College. During the Kick-Off, our dedicated resources will develop a meeting cadence with Broward College to ensure a smooth and flawless implementation of the Call Center operation. The implementation team will spend time with your subject matter experts to record the Knowledge Base articles, define and maintain process workflows and escalation procedures, as well as learn the necessary skills to become a trainer to the rest of the delivery team. We will then prepare the Knowledge Base and discovery documents, and afterwards, seek your approval. Each task will be governed by the following project management approach to ensure that we provide a timely performance of service:

Launching the Project

- Define the project owners and stakeholders
- Determine the desired outcome(s)
- Delineate each of the project's component tasks
- Identify the resources
 - Identify any "project killers."
 - Identify the external resources
- Determine a timeline (or staged timelines) for each project component

Keeping the Project on Track

- Review, revise and reallocate
 - Keep everybody informed
 - Provide direction

IMPLEMENTATION APPROACH



Accountability and Reporting - Provide explanation and detailed examples of reports/dashboards and data that will be provided to maximize exceptional customer service and accountability.

Response: BlackBeltHelp uses Salesforce (NYSE: CRM), a cloud-based ticketing system, that allows us to track, produce, and customize customer service reports in both real time and historical, for each service area, along with customer satisfaction surveys.

Our solution provides both real time dashboards and archived self-service reporting capabilities of incident and queue performance. BlackBeltHelp uses best of breed tools, including Salesforce® (ticketing system) and Collin inContact® (interaction management system) that allows us to get excellent reports, and customized dashboards that are produced based on the clients’ needs. BlackBeltHelp has the ability to add additional fields and workflows inside Salesforce® and inContact® to completely customize the reporting system to meet the needs of an institution. Reporting periods that are available are Year to Date, Quarterly, Monthly, Weekly and Daily.

BlackBeltHelp captures all possible metrics (as per industry standards). The following are some, but not all the metrics that we use:

- Agent Statistics Report(s)
 - Call Detail Report
 - Summary Report
 - Chat Function Detail Reports
 - Activity Report
 - Unavailability Report
- Call Center Report(s)
 - Incoming Call Reports
 - Handle Time (Call length) Report
 - Abandoned Call Report
 - Presented Calls Report

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- Call Origin (Reason for call) Report
- Escalation to Broward College Rate Report
- Reason for Escalation to Broward College Report
- Customer Satisfaction Report
- How students contacted Report (phone, email, chat)
- What time students contacted Report (normal business hours, evenings, weekends)
- Summary Report
- Service Level Report
- Call Detail Report
- Hold Time Report
- Speed of Answer Report

When we onboard any client, we provide 14 different reports and a dashboard to visually see all the information as how BlackBeltHelp is servicing your users. The reporting engine facilitates exporting data in CSV and XLS format out of the box.

Sample Reporting:

REPORTING & DASHBOARDS

Day	Calls Offered	Calls Answered	Phone ASA (Seconds)	Phone AHT (Minutes)	Calls Abandoned	Calls Aband in less than SLA	Avg. Abandoned Time (in Sec.)	Avg. Hold Time, Starting (in Sec.)
01-Aug	54	50	21	14.60	4	1	103	17
02-Aug	150	103	22	12.10	8	5	169	15
03-Aug	26	25	18	18.84	1	1		31
04-Aug	14	13	19	18.83	1	1		36
05-Aug	107	99	18	13.02	8	4	76	19
06-Aug	60	61	17	12.17	2	1	88	23
07-Aug	56	54	16	11.08	2	2		5
08-Aug	66	58	41	12.79	8	5	102	6
09-Aug	53	53	15	13.42				18
10-Aug	6	5	34	10.12	1	1		
11-Aug	3	5	15	3.15				
12-Aug	91	75	24	13.45	16	10	76	24
13-Aug	71	57	41	12.75	14	11	76	24
14-Aug	88	72	61	16.08	15	11	57	35

Real-Time Reports:

Real Time SL Dashboard

Handled out of Service Level: **2** | Handled within Service Level: **48** | **96.4%**

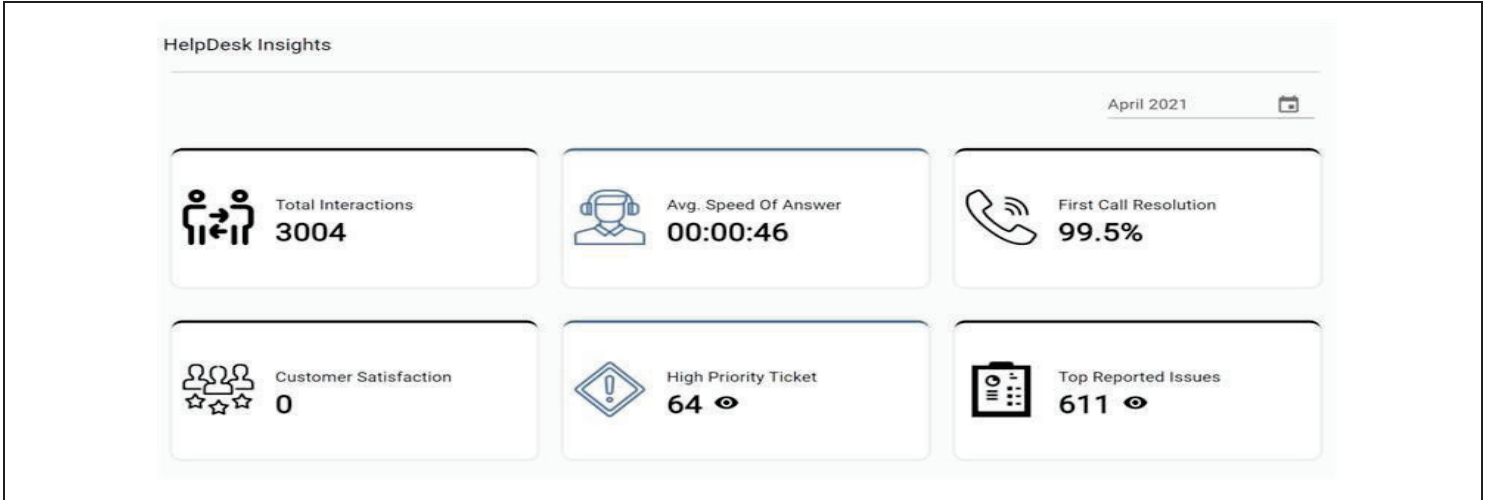
Interactions in Queue

	Contacts in Queue	Longest Wait
Phone	0	00:00:00
Chat	0	00:00:00
Email	3	00:15:27

Skill Summary

Skill Name	Currently Queued	Longest Duration	SLA%	In SLA	Out SLA	Agent Logged In	Agent Working	Agent Avail	Agent Unavail
Admissions)-PhoneIn	0	00:00	100	3	0	8	1	0	5
Counselling)-PhoneIn	0	00:00	75	3	1	8	0	0	5
FinAid)-PhoneIn	0	00:00	100	4	0	8	1	0	5
Non-Credit)-PhoneIn	0	00:00	100	2	0	8	0	0	5
Chat	0	00:00	100	0	0	7	0	0	5

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Coordination and Communication - Provide detailed information on how Respondent will coordinate and communicate status and completion of services. Describe how Respondent will communicate with assigned College personnel prior to, during, and after job commencement.

Response: BlackBeltHelp will assign a dedicated Customer Success Manager for Broward College, who will act as a first point of contact to address any concerns that may arise. He/she will liaison with the internal BlackBeltHelp’s **Customer Success Team** to ensure Broward College’s concerns (if any) are promptly addressed.

BlackBeltHelp’s **Customer Success Team** will stay in constant touch to ensure the continuity of services. The Customer Success Manager coordinates with our operations, training, and knowledge management teams to review trends and provide analysis and recommendations. This is not only limited to BlackBeltHelp’s process, procedures, and delivery, but also includes a holistic view of the interactions we are having with your students as a way to drive continuous improvement of our customer service and your student’s experience.

Timeframe - Provide a detailed project timeframe to implement and execute the services.

Response: Please find below our standard timeline for the implementation and execution of services.

1. Sales - Introduction & Kick-Off

- Week 1-2: Initial meetings and project kick-off
- Define project scope, objectives, and key stakeholders
- Establish communication channels and reporting structure

2. Implementation - Discovery Doc Working Session

- Week 2-3: Collaborative working sessions with the client's team
- Gather detailed requirements, access necessary systems and tools
- Develop a comprehensive Discovery Document

3. Documentation - KB Articles

- Week 3-5: Start creating Knowledge Base (KB) articles
- Tailor KB content to client's specific needs
- Ensure accuracy and completeness of articles

4. Configuration - Agent Upskilling

- Week 5-7: Configure contact center systems and tools

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- Ensure agents have necessary software, access, and hardware
- Provide agents with training materials and resources

5. Training - Training Module

- Week 7-8: Develop training modules and materials
- Conduct training sessions for agents
- Assess agent knowledge through testing and certification

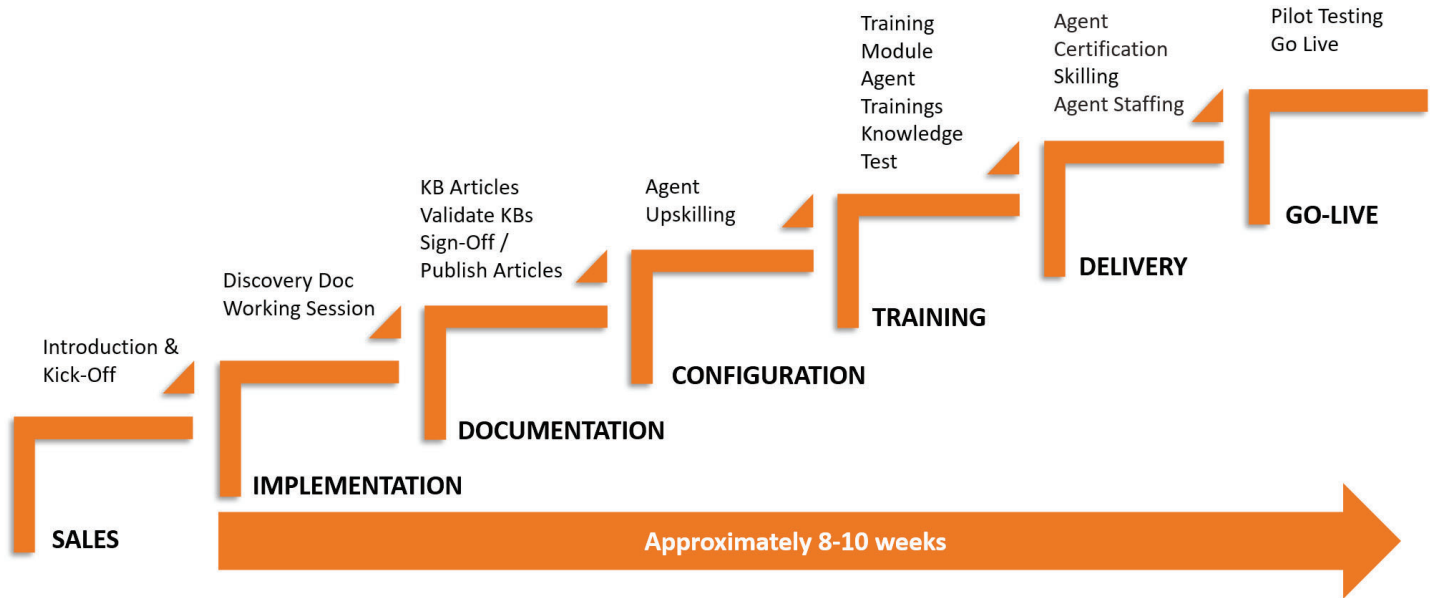
6. Delivery - Agent Certification Skilling

- Week 8-9: Agents undergo certification skilling
- Evaluate and certify agents based on performance
- Ensure agents are prepared for real-time support

7. Go-Live - Pilot Testing Go Live

- Week 9-10: Initiate pilot testing with a select user group
- Evaluate system performance, agent readiness, and user satisfaction
- Address any issues and refine processes as needed
- Provide ongoing support, feedback, and optimization

IMPLEMENTATION PHASES & TIMELINE – ONESTOP & IT HELP DESK



This timeline is a general guideline and can be adjusted based on the specific requirements and scale of the project. We are committed to working closely with our clients to ensure a smooth and successful implementation process, with a focus on delivering high-quality services from start to finish.

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TAB 8

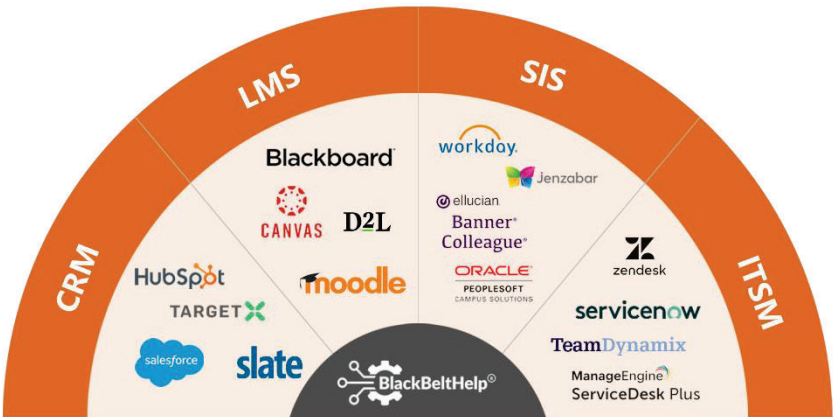
QUESTIONNAIRE – ATTACHMENT L

COLLEGE REQUIREMENTS		RESPONDENT REPLY (Responses such as “complies” or “agrees” are not sufficient.)
1	Describe your company’s experience with delivering Contact Center solutions for higher education One-Stop (Recruitment, Admissions advice, Financial Aid, cashier office and/or Registrar, Referral Services, and general institution information) and Help Desk support services. Provide a breakdown of your existing clients in the industry.	<p>BlackBeltHelp has continuously and successfully provided Student Services support and IT Helpdesk services to more than 200 higher education institutions during its 17-year history. BlackBeltHelp is a leading provider of Contact Center Solutions in higher education, which includes a scalable business model and focuses on timely responsiveness, outreach, and world-class customer service. BlackBeltHelp ensures that the Contact Center Solutions they provide will result in increased student satisfaction due to our robust quality assurance model that provides continuous feedback to improve the student experience. BlackBeltHelp is a pioneer in answering incoming calls, web chats, emails, constituent-initiated ticket system requests, automating issue resolution through AI Chatbots, and providing robust and comprehensive reports related to all interactions at appropriate intervals.</p> <p>We have a record of success with our OneStop and Helpdesk Student Services support. Below are a few of the 200+ colleges and universities that we are currently working with:</p> <ul style="list-style-type: none"> • Pasadena City College • University of West Alabama • California Community College System • Pima Community College • The City College of San Francisco
2	Describe your method to capture customer sentiment and survey methodologies.	<p>BlackBeltHelp uses an integrated survey tool that provides an inline survey on each case closure. This tool ties each survey back to the ticket that generated the survey and allows reporting on CSAT at the agent level. This integration also allows the determination of the root cause of service issues and allows us to proactively address problems. This data is only used to work with the customer on CPI and is looped into our coaching and training processes for agent reviews.</p> <p>Below is a sample of the customer satisfaction survey used by one of our clients:</p>

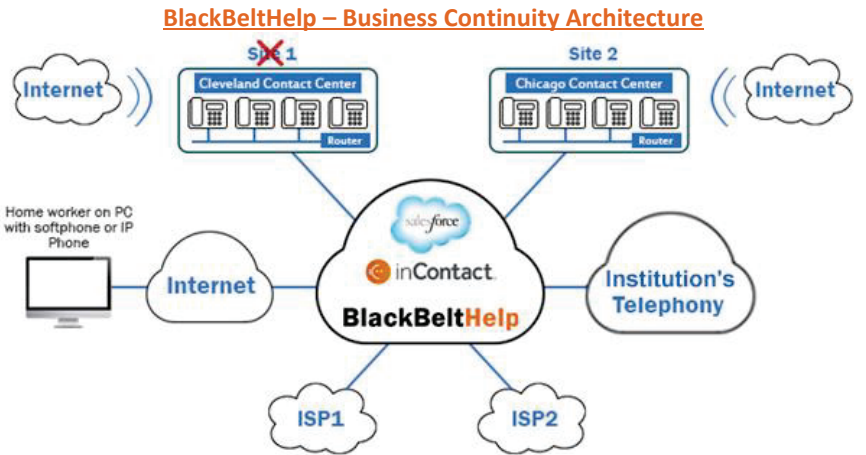
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		<p>* My issue was responded to in a timely manner.</p> <p><input type="radio"/> Agree Strongly <input type="radio"/> Agree <input type="radio"/> Neutral <input checked="" type="radio"/> Disagree <input type="radio"/> Disagree Strongly</p> <p>* The issue that led to my call or email was successfully resolved.</p> <p><input type="radio"/> Agree Strongly <input type="radio"/> Agree <input type="radio"/> Neutral <input type="radio"/> Disagree <input type="radio"/> Disagree Strongly</p> <p>* I received good customer service throughout my most recent help desk experience.</p> <p><input type="radio"/> Agree Strongly <input type="radio"/> Agree <input type="radio"/> Neutral <input type="radio"/> Disagree</p> <hr/> <p>The technician(s) with whom I worked were sufficiently knowledgeable to address my issue.</p> <p><input type="radio"/> Agree Strongly <input type="radio"/> Agree <input type="radio"/> Neutral <input type="radio"/> Disagree <input type="radio"/> Disagree Strongly</p> <p>* Overall, I was satisfied with my most recent help desk experience.</p> <p><input type="radio"/> Agree Strongly <input type="radio"/> Agree <input type="radio"/> Neutral <input type="radio"/> Disagree <input type="radio"/> Disagree Strongly</p> <p>Additional Comments</p> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <hr/> <p style="text-align: center;">Finish</p> <hr/> <p>The CSAT survey pasted above is a sample, and it is highly customizable. We are happy to customize the survey as per your needs and requirements during the implementation phase.</p>
3	How many physical and/or virtual centers do you operate, and where are these centers located?	BlackBeltHelp operates 24/7/365 contact centers from multiple locations. Our physical and virtual centers are strategically located to ensure seamless support. Specifically, we have work-from-home operations based in Chicago, IL, Cleveland, OH, Somerset, KY, and Sacramento, CA, as well as a center in Gurgaon, India (Please note that the Gurgaon, India operations are not applicable to Broward College)
4	What languages do you currently support?	Our staff is fluent in English and Spanish, having excellent communication (verbal and written) and emotional skills. We also have the ability to start a pilot project to provide support in additional languages.
5	What is the average length of your client relationships?	Our average client relationship spans approximately 5 years, with a minimum duration of 3 years and a maximum of 10 years. We take pride in establishing long-term partnerships with our clients, which reflects our commitment to providing consistent and reliable services.

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6	What are your mission statement and company values?	<p>BlackBeltHelp is committed to empowering students to maximize their educational experience, delivering higher satisfaction rates while reducing costs and increasing service availability for faculty, staff, and students.</p> <p>Company Values: Transparency: Openness and honesty in communication. Diversity and Inclusion: Fostering an environment that respects and celebrates diverse perspectives and backgrounds. Social Integrity: Upholding ethical standards and social responsibility. Innovation: Encouraging creativity and leveraging new ideas. Customer Service: Providing excellent service and support to our customers.</p>
7	What awards or recognition has your company received in the past 3 years?	<p>BlackBeltHelp regularly receives recognition from its clients, as is evidenced by our customer testimonials and referrals. Additionally, several higher education organizations, including EdgeCon and ISSP, have recognized BlackBeltHelp by choosing BlackBeltHelp to present at their national conferences.</p>
8	Describe your access to reporting capabilities (i.e., cloud-based) and custom reporting capabilities for clients.	<p>BlackBeltHelp uses Salesforce (NYSE: CRM), a cloud-based ticketing system that allows us to track, produce, and customize customer service reports, in both real-time and historical, for each service area, along with customer satisfaction surveys.</p>
9	Can reporting data be accessed in real time, or is there a delay?	<p>Our solution provides both real-time dashboards and archived self-service reporting capabilities for incident and queue performance. BlackBeltHelp uses best-of-breed tools, including Salesforce® (ticketing system) and Collin inContact® (interaction management system), that allow us to get excellent reports and customized dashboards that are produced based on our client’s needs. BlackBeltHelp has the ability to add additional fields and workflows inside Salesforce® and inContact® to completely customize the reporting system to meet your institution’s requirements. Reporting periods that are available are Year-to-Date, Quarterly, Monthly, Weekly, and Daily.</p>
10	Describe your telephony platform and software integration capabilities for TargetX and CID (College Integrated Database). *Note: CID is housed on a Linux platform.	<p>BlackBeltHelp has successfully implemented TargetX integrations for several clients. We have done bi-directional integration with Salesforce and can use REST APIs to integrate with the TargetX system. As part of our proprietary solution called "Advisor Desktop", we provide an integrated, custom, and easy-to-use interface for our advisors. With Advisor Desktop, resolution time is reduced, complaint troubleshooting increases, and customer satisfaction is improved.</p>  <p style="text-align: center;">Seamlessly Integrated Ecosystem</p>
11	Describe your hours of operation (including holidays).	<p>BlackBeltHelp has a Work Force Management (WFM) team that schedules and manages the staffing levels to maximize service while minimizing cost and</p>

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		<p>staffing disruptions 24 hours a day, 7 days a week, and 52 weeks a year, including holidays.</p>
<p>12</p>	<p>Describe your average turnaround time for technical service outages.</p>	<p>At BlackBeltHelp, we have an uptime of 99.99%. BlackBeltHelp has resource-independent physical contact center locations for redundancy. At each location, we maintain dual ISP links with active-active configurations on Cisco® firewalls, routers and switches, and UPS. We have backup plans at each location, so if one contact center experiences an outage, calls are automatically routed and are handled by another contact center that also utilizes NICE inContact® (interaction management system) and Salesforce® (optional ticketing system). Since these platforms are cloud-based, we are able to continue to operate business as usual, and all the historical data, call flows, ticket data, and reporting will continue uninterrupted.</p> <p>BlackBeltHelp currently has US agent teams from locations that include Chicago, IL; California; Somerset, KY; and Cleveland, OH.</p> <p>Below, please refer to the illustration of our system architecture, which includes BlackBeltHelp’s telephony, interaction management platform NICE inContact® (NASDAQ: SAAS), BlackBeltHelp’s optional ticketing system, Salesforce® (NYSE: CRM), and BlackBeltHelp’ contact centers:</p>  <p>BlackBeltHelp has never experienced any event that has resulted in a complete “failure” of the system. Therefore, the events that would result in a failure of the “system,” where the system is defined as BlackBeltHelp’s contact centers, would include 1) a simultaneous power outage in all the locations or the simultaneous failure of all the contact center’s networks. Both simultaneous events are more than highly unlikely to ever happen.</p>
<p>13</p>	<p>Describe the extent to which you provide transparency around KPIs.</p>	<p>At BlackBeltHelp, we believe that transparency around Key Performance Indicators (KPIs) is of the utmost importance. We understand that our clients rely on clear and actionable insights to measure the effectiveness of our services. Here's how we ensure transparency in this regard:</p> <ol style="list-style-type: none"> Regular Reporting: We provide comprehensive reports on KPIs at regular intervals, whether daily, weekly, monthly, or as per the client's preference. These reports include key metrics such as call volume, response times, resolution rates, and customer satisfaction scores.

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		<ol style="list-style-type: none"> 2. Customized Dashboards: Clients have access to customized dashboards that display real-time KPI data. This allows them to monitor performance and make informed decisions in real time. 3. Performance Reviews: We conduct periodic performance reviews with clients to discuss KPI trends, identify areas for improvement, and set performance targets. These meetings foster open communication and collaborative problem-solving. 4. Data Accessibility: Clients have full access to their data and can request specific data points at any time. We ensure data security and confidentiality while granting access to relevant stakeholders. 5. Benchmarking: We provide benchmarking data to help clients compare their KPIs against industry standards or their own historical performance. This helps in setting realistic goals for improvement. 6. Continuous Improvement: We work closely with clients to implement strategies for KPI improvement. This may involve training, process optimization, or technology enhancements, and the progress is transparently tracked. 7. Issue Resolution: If KPIs fall below agreed-upon levels, we promptly identify root causes and implement corrective actions. We keep clients informed about the steps taken and the expected timeline for improvement. 8. Feedback Loop: We encourage clients to provide feedback on our reporting and transparency practices. Client input is invaluable in fine-tuning our processes to better meet their needs. <p>In summary, our commitment to transparency ensures that clients have a clear view of their contact center's performance through accessible data, regular reporting, and collaborative efforts to continuously improve KPIs. We understand that KPIs are vital for making informed decisions and driving success in the contact center environment.</p>
14	<p>Describe your system/process to alert you on issues beyond your tolerance (i.e., 150% volume increase impacting Avg. Speed to Answer) and your approach to handling urgent service.</p>	<p>BlackBeltHelp has a Work Force Management (WFM) team that schedules and manages the staffing levels to maximize service while minimizing cost and staffing disruptions 24 hours a day, 7 days a week, and 52 weeks a year, including holidays.</p> <p>BlackBeltHelp does forecast the number of customer contacts for all channels in order to staff accordingly, using the WFM Team. The WFM team forecasts the workload according to historical interaction data and projected interaction volume given by the client. The WFM team then creates the staffing plan and sets the schedules to efficiently match the workforce to the workload. This way, BlackBeltHelp is able to provide quality service to all our clients and exceed our SLA agreements on a consistent basis.</p> <p>Also, we have a robust system for alerting and addressing issues that are beyond our tolerance levels, which is crucial to maintaining service quality. Here's how we manage such situations:</p> <ol style="list-style-type: none"> 1. Client Notification: Our clients play a pivotal role in alerting us to issues beyond tolerance levels. If a significant problem arises, such as a 150% volume increase impacting Average Speed to Answer (ASA), the client promptly informs us via email. This initial client communication is our first line of awareness. 2. Ticket Creation in Salesforce: Upon receiving the client's email notification, we immediately initiate our incident management process. A dedicated team is

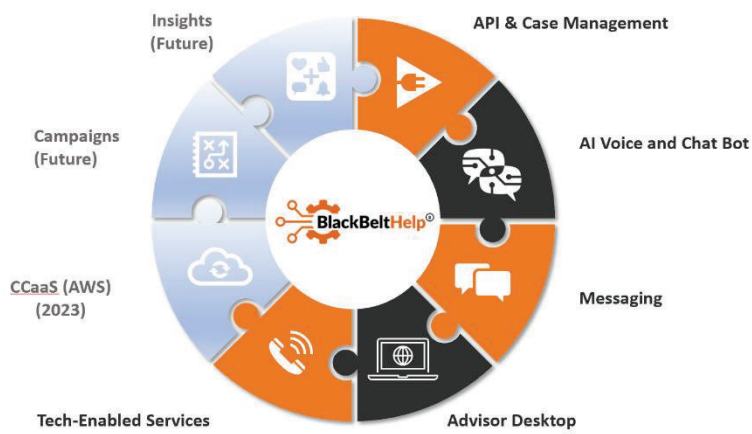
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		<p>responsible for creating a service ticket within our Salesforce CRM system. This ticket is designated as "Urgent" to signify its critical nature.</p> <p>3. Automated Agent Alerts: Simultaneously, our Salesforce system is configured to trigger automated alerts to all agents who are assigned to work on the affected account. These alerts are disseminated via email and, if necessary, through our internal communication channels to ensure immediate awareness.</p> <p>4. Escalation and Prioritization: Our ticketing system incorporates well-defined escalation procedures. If the issue remains unresolved or extends beyond an acceptable timeframe, it automatically triggers an escalation to higher-tier support or management, ensuring that urgent matters receive the attention they demand.</p> <p>5. Around-the-Clock Support: We maintain 24/7 support capabilities to address critical issues promptly, regardless of when they arise. Our support teams work in shifts to provide continuous coverage.</p> <p>6. Root Cause Analysis: Simultaneously with issue mitigation, we initiate a parallel investigation to identify the root cause. Our team conducts thorough analyses, reviewing system logs, monitoring tools, and other relevant data sources to pinpoint the issue's origin.</p> <p>7. Mitigation and Communication: As we work to resolve the urgent issue, we maintain transparent and consistent communication with the client. We keep them updated on our progress, estimated resolution times, and any interim measures put in place to mitigate the impact.</p> <p>8. Post-Incident Review: After successfully addressing the urgent issue, we conduct a post-incident review to gain insights into what transpired and why. This review aids in implementing preventive measures and process improvements to minimize the likelihood of similar incidents in the future.</p> <p>9. Comprehensive Documentation: Every action, communication, and resolution is meticulously documented within the Salesforce ticket. This documentation serves as a reference for future analysis, reporting, and auditing purposes.</p>
15	<p>When was your last CTI (Computer Telephony Integration) upgrade, and how do you prepare for upgrades and evolving tech needs?</p>	<p>At BlackBeltHelp, we utilize NICE inContact, a cloud contact center software solution that includes integrated Softphone (Telephony system) capabilities for interacting with users and clients. When it comes to CTI (Computer Telephony Integration) upgrades and staying prepared for evolving tech needs, here's our approach:</p> <p>Upgrade Information: We maintain a proactive stance when it comes to upgrades from NICE inContact. The provider typically informs us in advance through email notifications. These notifications include critical information such as the type of upgrade being planned.</p> <p>Assessment of Impact: We thoroughly assess the potential impact of these upgrades on our current services. This assessment helps us anticipate any service disruptions or changes that may occur as a result of the upgrade.</p> <p>Real-Time Monitoring: In addition to email notifications, we have a dedicated site that allows us to monitor real-time disturbances or issues. This real-time monitoring enables us to respond promptly to any unexpected disruptions and implement mitigation measures if necessary.</p> <p>By staying well-informed about upcoming upgrades, assessing their impact, and monitoring our systems in real-time, we ensure a smooth transition during CTI upgrades and remain prepared to meet evolving tech needs effectively. Our goal</p>

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		is to minimize any potential service disruptions and provide uninterrupted support to our clients and users.
16	Describe your service model offerings (i.e., Blended vs. Non-blended queues).	<p>BlackBeltHelp offers two distinct service models to cater to the unique needs of our clients: Blended and Non-Blended Queues. Here's an overview of these service model offerings:</p> <p>1. Blended Queue Model:</p> <ul style="list-style-type: none"> • Dedicated and Shared Agents: In the Blended Queue model, we provide a combination of dedicated and shared agents to support the client. • Flexibility: This model offers flexibility in agent allocation. Dedicated agents are exclusively assigned to a single client, ensuring a deep understanding of their specific needs and processes. Shared agents, on the other hand, are equipped to handle inquiries from multiple clients, promoting resource efficiency. • Scalability: The Blended Queue model allows for easy scalability. Dedicated agents can be added as the client's requirements grow, and shared agents can assist in handling fluctuating call volumes or seasonal peaks. <p>2. Non-Blended Queue Model:</p> <ul style="list-style-type: none"> • Dedicated or Shared Agents: In the Non-Blended Queue model, we provide a choice between dedicated agents or shared agents, depending on the client's preferences and requirements. • Dedicated Agents: Clients who opt for dedicated agents receive a team exclusively focused on their needs. This setup ensures a high level of familiarity with the client's operations, resulting in a personalized and tailored service. • Shared Agents: For clients who prefer shared agents, we allocate resources from a pool of agents who serve multiple clients. This approach can be a cost-effective solution while maintaining service quality. <p>Client-Centric Approach: In both models, we maintain a client-centric approach, ensuring that the chosen service model aligns with the client's objectives, budget, and service level expectations.</p>
17	How many minutes of service outages have you experienced in the last 5-years?	<p>We are proud to report that we have experienced zero minutes of service outages in the last five years. This impeccable record reflects our commitment to delivering uninterrupted and reliable support services to our clients and users. Our robust infrastructure, proactive monitoring, and disaster recovery plans are all part of our strategy to ensure continuous service availability and minimize any potential disruptions.</p>
18	What standard and custom reporting capabilities do you have? Provide examples of standard and custom reporting.	<p>Our reporting capabilities at BlackBeltHelp are designed to provide real-time and historical insights into our service performance. Leveraging best-of-breed tools like Salesforce and inContact, we ensure that our clients have access to the data and reports they need to monitor, evaluate, and continuously improve their service operations.</p> <p>Here's an overview of our standard and custom reporting capabilities:</p> <p>Standard Reporting:</p>

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		<ol style="list-style-type: none"> Agent Statistics Reports: These reports provide a detailed view of agent performance, including metrics such as call details, activities, summaries, and unavailability. Call Center Reports: Standard call center reports encompass incoming call statistics, abandoned call rates, handle times (call lengths), presented call data, call origin (reason for call), summary reports, escalation rates, service levels, reasons for escalation, hold times, customer satisfaction metrics, contact channels (phone, email, chat), and response times for different timeframes (normal business hours, evenings, weekends). <p>Custom Reporting:</p> <ol style="list-style-type: none"> Real-time Dashboards: We offer real-time dashboards customized to each client's specific service area needs. These dashboards provide instant visibility into ongoing service performance. Archived Self-Service Reporting: Our reporting system allows for the retrieval of historical data, enabling clients to analyze trends and patterns over time. Customization of Fields and Workflows: We have the capability to add additional fields and workflows inside Salesforce and inContact to tailor the reporting system according to the unique requirements of the institution we serve.
19	<p>Which live-assisted channel services are you capable of handling? (i.e., chat, voice, message, email, phone, texting/SMS, etc.).</p>	<p>BlackBeltHelp has designed an open, multi-channel integrated platform to streamline student engagement across the campus. Our platform, SIMPLIFY, works with existing enterprise applications to provide personalized information to students in whatever mode of communication the student and institution prefer. We've built this tool based on our years of experience providing live Student Services and IT support.</p> <p>SIMPLIFY can be utilized to provide live and automated AI-assisted support to students via chat, phone, email, and messaging. While our AL chat and voice bot are components of SIMPLIFY, the platform also includes our engagement messenger tools, Advisor Desktop, and self-service, all of which are powered by integrated data, AI, and process automation.</p>  <p>Please find below a detailed description of our products:</p>

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AI Voice and Chat bot with integrated transfer capability: Our AI-powered Bot provides your end-users immediate access to support 24/7, anytime, anywhere. Our intelligent AI Bot lets your customers solve their support issues immediately and reduces the number of helpdesk interactions, reducing your support costs. It handles multiple users simultaneously and transfers the issue to a live agent if it requires human expertise.

AI Voice and Chat bot

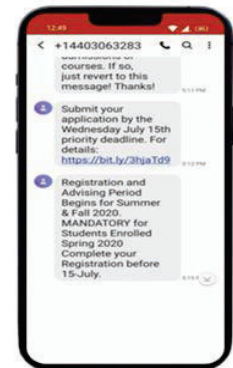
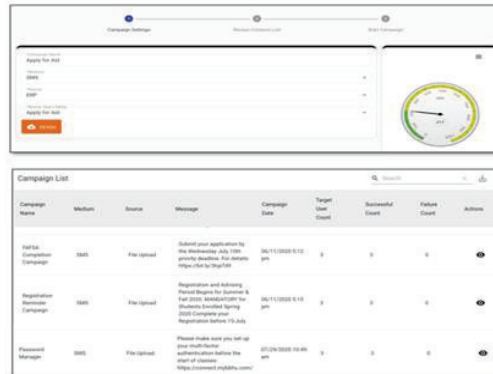


Interaction Date	Query	Response	Bot	Response Submitted Date	Training Status	Trained Date
03/13/2023	How many months of VA educational benefits do I have left?	Our records indicate that you have 12 months of benefits remaining	BlackBelt	03/15/2023	Done	03/15/2023
03/07/2023	Will my transcript include all my coursework?	Your transcript will contain all coursework from this institution.	BlackBelt	04/18/2023	Pending	--
01/05/2023	Is tutoring available?	Yes, call the counseling office	BlackBelt	01/24/2023	Done	01/24/2023
12/02/2022	My wifi is not working	Visit our public KB at blhu.blackbelthelp.com and search for this issue.	BlackBelt	01/11/2023	In Progress	--

Engagement Messenger –: *Create Targeted Outbound SMS/Text Campaigns for Students*

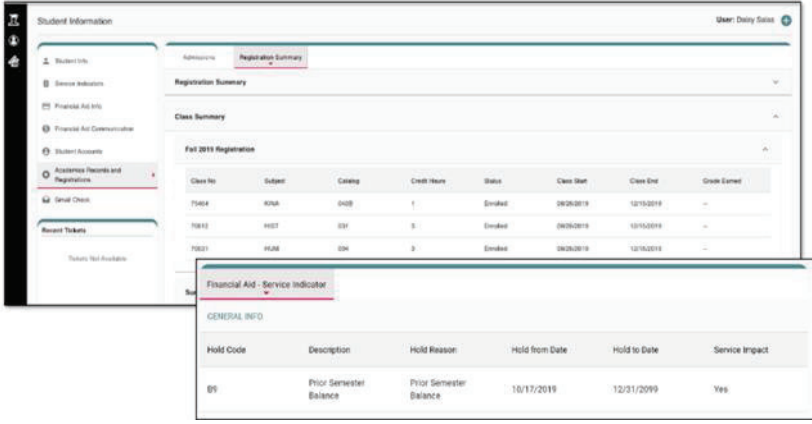
With BlackBeltHelp’s proactive messages, institutions can encourage students to take specific action through a targeted outbound campaign. Campaigns will enable increased student engagement and successful outcomes.

Engagement Messenger



Advisor Desktop: *Displays View-Only Data to Quickly and Accurately Resolve Student Queries*

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		<p>Advisor Desktop is an AI-powered CX solution where all the information an advisor needs to resolve an issue is on a single screen, and complicated tasks are handled with just a click of a button.</p> <p style="text-align: center;">Advisor Desktop</p> 
20	<p>What percentage of the project manager(s)'s time will be dedicated to our Contact Center?</p>	<p>At BlackBeltHelp, we are committed to providing dedicated project management support to ensure the success of your Contact Center project. While the specific percentage of a project manager's time allocated to your project may vary depending on the scope and requirements, you can be assured that our project managers are fully engaged and focused on delivering exceptional results.</p> <p>Our project management approach is tailored to the unique needs of each project and client. We allocate the necessary resources and expertise to effectively plan, execute, and monitor your Contact Center project, ensuring that it receives the attention and dedication it deserves.</p> <p>Rest assured that our project managers are highly skilled professionals who understand the importance of delivering on time, within budget, and to your satisfaction. We will work closely with you to determine the appropriate level of involvement and support needed to achieve your project's objectives. Your success is our priority, and our project managers are here to support you every step of the way.</p>
21	<p>Name your five largest clients (in higher education if applicable) and how long they have been clients.</p>	<p>Here are our five largest clients in higher education and their respective tenures with BlackBeltHelp:</p> <ol style="list-style-type: none"> 1. Collin County Community College District <ul style="list-style-type: none"> ○ Tenure with BlackBeltHelp: Since 2017 ○ FTE Count: 35,077 2. California Community Colleges <ul style="list-style-type: none"> ○ Tenure with BlackBeltHelp: Since 2017 ○ FTE Count: 2,000,000 3. Pasadena City College <ul style="list-style-type: none"> ○ Tenure with BlackBeltHelp: Since 2019 ○ FTE Count: 21,923 4. Cleveland State University <ul style="list-style-type: none"> ○ Tenure with BlackBeltHelp: Since 2014 ○ FTE Count: 14,385 5. Riverside Community College District

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		<ul style="list-style-type: none"> ○ Tenure with BlackBeltHelp: Since 2016 ○ FTE Count: 30,000
22	Do you serve any clients who would be considered a competitor? Describe why or why not.	<p>BlackBeltHelp is dedicated to providing exceptional support solutions to colleges and universities across the U.S. We prioritize client confidentiality and adhere to strict ethical guidelines, which means we do not share our client’s proprietary information, thus remaining neutral within the education industry.</p> <p>Our commitment to delivering tailored and innovative support services is rooted in our dedication to the education sector. We understand the unique needs and challenges faced by educational institutions, and our focus is on helping them succeed by offering specialized solutions.</p> <p>By maintaining a client portfolio exclusively within the education industry, we ensure that our clients can trust us as a partner who fully understands and supports their mission, values, and goals. This approach allows us to provide the highest level of service and expertise to our educational clients without any conflicts of interest.</p>
23	What is your target average speed to answer, and what historical accomplishments in meeting that target?	Our target for average speed to answer is set at 60 seconds. We are proud to report that we have consistently met and exceeded this target, with a historical accomplishment rate of more than 80%.
24	What is your target average handle time (Help Desk & One Step), and what historical accomplishments in meeting that target?	Our target for average handle time at the Help Desk is set at 6 minutes, and for One Stop Student Services, it is also 6 minutes. We are proud to share that we have consistently met and often exceeded this target, with a historical accomplishment rate of more than 85%.
25	What percentage of inbound interactions are deflected with self-service?	Approximately 31.50% of our inbound interactions are deflected through self-service options. We prioritize implementing effective self-service solutions to empower our clients and users to find answers to their inquiries independently, reducing the need for direct interaction with our support agents.
26	Describe your self-service support models for volume deflection.	<p>We employ a multifaceted self-service support model designed to efficiently deflect volume and enhance the user experience. Our self-service support models include:</p> <p>1. Knowledge Base: We provide a comprehensive public-facing knowledge base. This knowledge base serves as the initial point of contact for users seeking information and assistance. It contains a wealth of resources, articles, FAQs, and guides to address a wide range of inquiries, empowering users to find answers independently.</p> <p>2. AI Chat and Voice Bot: In cases where users' queries cannot be resolved through the knowledge base, we offer a chat and voice bot solution. These bots are the users' first point of contact for immediate support. Our bots are trained on the top call drivers, following the 80-20 logic, to address tier 1 queries effectively. Additionally, they can be seamlessly integrated with campus applications to provide user-specific responses and assistance.</p> <p>These self-service options are strategically designed to not only deflect volume but also provide efficient and user-friendly support.</p>


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<p>27</p>	<p>What technologies do you use for security and safety in protecting client data?</p>	<p>At BlackBeltHelp, we prioritize the security and safety of client data through a combination of technologies and practices. Here are some key elements of our approach:</p> <ol style="list-style-type: none"> 1. Cloud-Based Solutions: We primarily utilize NICE inContact and Salesforce as our core solutions. These cloud-based applications adhere to industry-standard security compliance measures, ensuring that client data is protected in a secure environment. 2. Secure Access: We establish secure connections to access client applications. These connections can only be accessed after a user logs in to the Virtual Private Network (VPN), which is linked to their Active Directory (AD) credentials. This multi-layered access control mechanism safeguards client data from unauthorized access. 3. Endpoint Detection and Response (EDR): All advisor machines are equipped with Endpoint Detection and Response (EDR) software. EDR solutions play a critical role in identifying and mitigating potential security threats, providing an added layer of protection for client data. 4. System Monitoring: We conduct regular system monitoring to detect and promptly respond to any unusual or suspicious activities. Proactive monitoring helps us identify and address security issues before they can escalate. 5. Cybersecurity Training: Our advisors undergo cybersecurity training to enhance their awareness and understanding of security best practices. This training empowers them to recognize and effectively respond to potential security threats. 6. Regular Audits: As part of our commitment to security, we conduct regular audits in alignment with our ISO certification for Information Security Management System (ISMS). These audits help ensure that our security protocols are robust, up-to-date, and compliant with industry standards. <p>Our comprehensive approach to security combines technological solutions with ongoing training, monitoring, and compliance to safeguard client data and maintain the highest standards of security and safety.</p>
<p>28</p>	<p>Over the past 5 years, what is the percentage of calls received in English vs. non-English?</p>	<p>Over the past five years, the distribution of calls received in our contact center based on language is as follows:</p> <ul style="list-style-type: none"> • English: 98% • Spanish: 2% <p>We maintain a strong focus on multilingual support to cater to the diverse needs of our users and clients, with the majority of calls being conducted in English. Additionally, we are capable of providing support for new languages as and when the need arises. ed.</p>
<p>29</p>	<p>What time of the day, days of the week, or times of the year do calls typically peak?</p>	<p>Our observations and historical data suggest the following trends:</p> <p>Time of the Day: Calls tend to peak between 10:00 AM and 10:00 PM Eastern Standard Time (EST). This time frame aligns with common business hours when students and faculty are actively seeking support and assistance.</p> <p>Days of the Week: Call volumes vary throughout the week, with higher call traffic observed during weekdays. Weekends generally see reduced call volumes.</p>

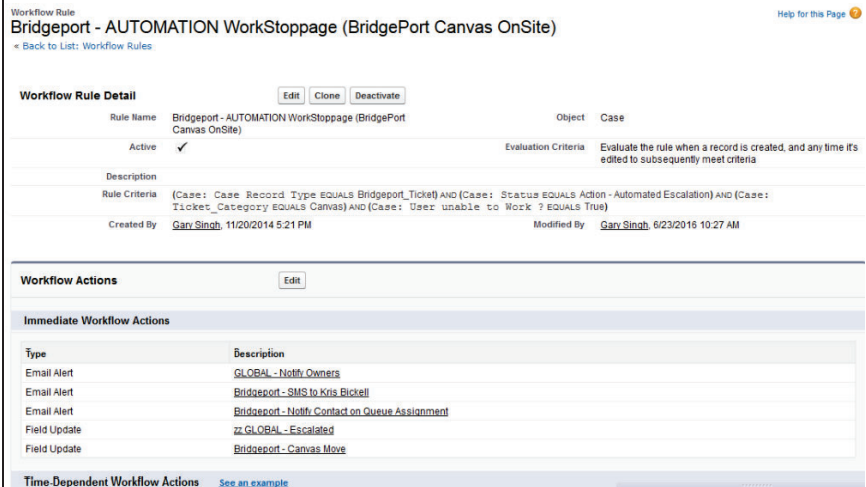
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		<p>Times of the Year: Call volumes experience seasonal fluctuations, with two significant peaks:</p> <ul style="list-style-type: none"> • Fall Rush: August and September witness a substantial increase in call volumes. This corresponds to the start of the fall semester when students are enrolling, seeking academic assistance, and addressing various back-to-school needs. • Spring Rush: January and February mark another peak period for call volumes. This aligns with the beginning of the spring semester, similar to the fall rush, where students require support for course registration, academic inquiries, and other related matters.
30	Describe the process for Knowledge Management, including creating and updating knowledge-based articles for your clients.	<p>Please refer to a detailed description of our process for Knowledge Management, including creating and updating knowledge-based articles for our clients:</p> <p>Kick-Off Meeting: We initiate the Knowledge Management process with a Kick-Off meeting, during which we appoint a dedicated Implementation Manager and a Trackless Representative to work closely with the client, in this case, Broward College. This meeting serves as the foundation for our collaborative efforts and the smooth implementation of the Call Center operation. During this phase, our dedicated resources establish a meeting cadence with the college to ensure effective communication and alignment of objectives.</p> <p>Knowledge Capture: Our implementation team invests time with the subject matter experts at Broward College to capture essential knowledge. This includes documenting processes, workflows, and escalation procedures that are unique to the college’s operations. Additionally, our team learns the skills required to become trainers for the rest of the delivery team, ensuring knowledge transfer and continuity.</p>
31	Please outline your current resolution rate.	Our current resolution rate is consistently exceeding 90%. This high-resolution rate reflects our dedication to promptly and effectively addressing the inquiries and issues of our clients. Our team continually strives to maintain and even exceed this exceptional resolution rate to deliver the best possible service.
32	Please outline your current abandonment rate.	Our current abandonment rate is less than 7%.
33	How are customer sentiment and satisfaction scores used to improve services?	<p>At BlackBeltHelp, customer sentiment and satisfaction scores play a pivotal role in our continuous improvement process. We leverage these valuable insights to enhance our services in the following ways:</p> <ol style="list-style-type: none"> 1. Continuous Feedback Loop: We actively seek and collect customer feedback through surveys, evaluations, and direct interactions. This feedback serves as a vital source of information about our clients' experiences and expectations. 2. Data-Driven Decision Making: Customer sentiment and satisfaction scores are analyzed and translated into actionable data points. We use data analytics to identify trends, patterns, and areas where improvement is needed. 3. Service Enhancements: Armed with customer feedback, we initiate service enhancements to address identified pain points and opportunities for

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		<p>improvement. This can include refining processes, updating training materials, or implementing technology upgrades.</p> <p>4. Tailored Training Programs: Customer feedback helps us identify specific training needs for our support staff. We design tailored training programs to equip our team with the skills and knowledge required to meet and exceed client expectations.</p> <p>5. Technology Integration: Customer sentiment and satisfaction data guides our decisions regarding the integration of cutting-edge technologies and tools that can improve service delivery.</p> <p>6. Proactive Issue Resolution: When negative feedback is received, we take proactive steps to address and resolve issues promptly, demonstrating our commitment to client satisfaction.</p> <p>7. Client-Centric Approach: Our entire team is aligned with a client-centric approach, where the ultimate goal is to meet and exceed our clients' expectations. This approach is reflected in all our interactions and service offerings.</p> <p>8. Regular Performance Monitoring: We continually monitor our performance and benchmark it against industry standards to ensure that we are on track to deliver exceptional service.</p> <p>10. Collaboration with Clients: We collaborate closely with our clients, encouraging open communication and partnership. This collaborative approach allows us to tailor our services to their unique needs and expectations.</p>
34	Describe your training process to meet FERPA requirements for agents.	<p>BlackBeltHelp is ISO 27001:2013 certified. BlackBeltHelp recognizes the importance of and is familiar with the requirement for security and confidentiality of client and student information. Systems and procedures are in place to ensure that client and student data are always safeguarded. This ranges from technology to staff training to continuous management monitoring. FERPA training is the first course new agents take when joining the BlackBeltHelp team. Agents must pass a FERPA certification exam before proceeding to any other coursework. A 100% score is required on the FERPA exam, and agents must re-certify annually to remain employed.</p> <p>In addition, our product does not disclose any user's personal information until a client wants our product to do so.</p> <p>As per the protocols defined by the client, if our product must disclose any user personal information – no information is disclosed unless the user has been authenticated. There are multiple ways to authenticate the user:</p> <ul style="list-style-type: none"> • Authenticate using LDAP credentials • Provide answers to security questions <p>BlackBeltHelp safeguards Sensitive Data according to all commercially reasonable administrative, physical, and technical standards (e.g., such standards established</p> 

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		<p>by the National Institute of Standards and Technology or the Center for Internet Security); Continually monitors its operations and takes any action necessary to ensure the Sensitive Data is safeguarded.</p> <p>We only use, reuse, distribute, transmit, manipulate, copy, modify, access, or disclose Institutional Data to the extent necessary for BlackBeltHelp to implement and maintain the System. BlackBeltHelp shall hold an Institution's Data in confidence and protect the Data to the same extent and in at least the same manner as BlackBeltHelp protects its own data, but in no case in a lesser manner than a reasonable degree of care under the circumstances.</p>
35	Describe your chatbot software services (if applicable).	Our AI-powered Bot provides your end-users immediate access to support 24/7, anytime, anywhere. Our intelligent Bot lets your customers solve their support issues immediately and reduces the number of help desk interactions, reducing your support costs. It handles multiple users simultaneously and transfers the issue to a live agent if it requires human expertise.
36	What is your percentage of agents that are dedicated to live chat incidents?	<p>BlackBeltHelp will offer a dedicated team of 20 agents to Broward College who will specialize in handling live chat incidents. These agents are specifically trained and experienced in managing chat-based interactions. However, it's essential to note that our approach is holistic, and our agents are versatile in handling various types of interactions, including voice calls and email inquiries.</p> <p>Our agents' versatility ensures that we can provide comprehensive and well-rounded support across multiple channels, meeting the diverse needs of our clients and users. Whether it's through live chat, voice calls, or email, our dedicated team is equipped to deliver efficient and effective assistance while maintaining high service standards.</p>
37	Describe your contact center's escalation process, pathways, and workflow for One Stop & Help Desk support.	<p>BlackBeltHelp will do detailed discovery with Broward College during implementation to define in-scope and out-of-scope items. Any issue that is not resolvable at our end will be escalated to the Broward College team using the ticketing system and following Broward College's current/defined processes. This will be done by setting up Automation Workflows in the ticketing system.</p> <p>Please refer to the automated escalation workflow designed for one of our clients:</p>  <p>The screenshot displays the configuration for a workflow rule named "Bridgeport - AUTOMATION WorkStoppage (BridgePort Canvas OnSite)". It includes fields for Rule Name, Object (Case), and Evaluation Criteria. The rule is active and includes a description of its criteria: "(Case: Case Record Type EQUALS Bridgeport_Ticket) AND (Case: Status EQUALS Action - Automated Escalation) AND (Case: Ticket_Category EQUALS Canvas) AND (Case: User unable to Work ? EQUALS True)". It also shows the creator (Gary Singh) and the modification date (6/23/2016 10:27 AM). Below the rule details, there is a section for "Workflow Actions" which lists several immediate actions: "GLOBAL - Notify Owners", "Bridgeport - SMS to Kris Bickell", "Bridgeport - Notify Contact on Queue Assignment", "GLOBAL - Escalated", and "Bridgeport - Canvas Move".</p>

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		<p>BlackBeltHelp has a clearly articulated procedure for escalating problems via an internal chain of command, including conditions under which such escalations will automatically occur. BlackBeltHelp will follow escalation procedures discussed and agreed upon by Broward College regarding the nature of the emergency, including notifying the Broward College on-site team of the ticket, the scope of the outage, and number of customers affected.</p> <p>Here is a sample ticket notification layout for notifying the onsite team in case escalation occurs:</p> <p>***THIS IS A SYSTEM GENERATED MESSAGE! DO NOT REPLY!***</p> <p>Please be advised that the following SalesForce ticket has been assigned to {!Case.OwnerFullName}.</p> <p>Ticket Subject and Number Ticket #: {!Case.CaseNumber} Subject: {!Case.Subject}</p> <p>Contact details Contact Name: {!Case.Contact} Contact Phone (primary): {!Contact.Phone} Contact Phone (mobile): {!Contact.MobilePhone} Contact Phone (Web):{!Case.SuppliedPhone} Contact Email: {!Contact.Email}</p> <p>Ticket classification Category: {!Case.Ticket_Category__c} Type: {!Case.Ticket_Type__c} Item: {!Case.Ticket_Item__c}</p> <p>Location details Campus: {!Case.Campus__c} Building: {!Case.Building__c} Room: {!Case.Room_Number__c} Area Description: {!Case.Area_Description__c}</p> <p>Click the appropriate link below to view the ticket directly:</p> <p>Partner Portal Users: https://ceai.my.salesforce.com/{!Case.Id} BlackbeltHelp (Community Users): {!Account.Community_Tx_Link__c}{!Case.Id} URL to access tickets</p> <p>Description, internal notes and last comment on ticket Description: {!Case.Description} Internal Notes: {!Case.Internal_Notes__c} Last Comment on Case: {!Case.Last_Case_Comment} -----</p> <p>In addition, we have an internal Ticket Management Group (TMG) that actively monitors inputs to the Call Center operations and analyzes almost every ticket to ensure that the tickets are properly closed, escalated, resolved, and properly followed up (internally/externally) within the defined SLAs to track resolutions.</p>
38	Describe your approach to incident management, including the tools and technology used to track each incident reported.	<p>Our solution provides real-time dashboards and archives self-service reporting capabilities for incident and queue performance. BlackBeltHelp uses best-of-breeds Salesforce® (ticketing system) and NICE inContact® (interaction management system) that allows us to get excellent reports and customize dashboards based on the client’s needs. BlackBeltHelp can add additional fields and workflows inside Salesforce® and inContact® to completely customize the reporting system based on your institution’s requirements. Available reporting periods are Year to Date, Quarterly, Monthly, Weekly, and Daily. BlackBeltHelp captures all possible metrics (as per industry standards). The following is a list of metrics, but not limited to:</p> <ul style="list-style-type: none"> • Agent Statistics Report(s) <ul style="list-style-type: none"> ○ Call Detail Report ○ Chat Function Detail Reports

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		<ul style="list-style-type: none"> ○ Activity Report ○ Unavailability Report ○ Summary Report • Call Center Report(s) <ul style="list-style-type: none"> ○ Incoming Call Reports ○ Presented Calls Report ○ Service Level Report ○ Hold Time Report ○ Handle Time (Call length) Report ○ Escalation to College Rate Report ○ Customer Satisfaction Report ○ What time students contacted Report (normal business hours, evenings, weekends) ○ Abandoned Call Report ○ Summary Report ○ Call Detail Report ○ Speed of Answer Report ○ Call Origin (Reason for the call) Report ○ Reason for Escalation to College Report ○ How students contacted Report (phone, email, chat) <p>When we onboard any client, we provide 14 different reports and a dashboard to visually see the information on how BlackBeltHelp is servicing your users. The reporting engine facilitates data export in CSV and XL format boxes.</p>
39	Describe your Help Desk integration capabilities with TDX.	<p>BlackBeltHelp has a proven track record of successful Help Desk integration capabilities with TDX. Our expertise in this area includes:</p> <p>Bi-Directional Integration: We have successfully implemented bi-directional integrations with Salesforce, allowing for seamless data flow between the TDX system and our help desk platform. This integration ensures that information is shared efficiently and accurately across systems.</p> <p>REST APIs: We leverage REST APIs to facilitate integration with the TDX system. This modern and versatile approach enables us to securely access and exchange data, supporting real-time updates and efficient communication.</p> <p>Advisor Desktop: Our proprietary solution, "Advisor Desktop," is an AI-powered CX solution where all the information an advisor needs to resolve an issue is on a single screen, and complicated tasks are handled with just a click of a button. This integrated tool streamlines workflows, reduces resolution times, enhances compliance troubleshooting, and ultimately improves student satisfaction. It ensures that our advisors have access to the right information at the right time, optimizing their ability to assist clients effectively.</p>

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		By combining our technical capabilities with a deep understanding of TDX and Salesforce integration, we ensure that our clients benefit from a seamless and efficient Help Desk experience. Our commitment is to provide solutions that enhance support services and drive client satisfaction.
40	Describe your IVR model and capabilities for customization.	<p>We utilize NICE inContact as our contact center software, including its Interactive Voice Response (IVR) capabilities. NICE inContact's IVR system provides a range of features and capabilities for customization and efficient call routing. Here are some key aspects of our IVR model:</p> <ol style="list-style-type: none"> 1. Customizable IVR Design: NICE inContact's IVR system allows for the creation of highly customizable IVR flows. We can design and tailor IVR menus to match our client's specific requirements, including menu options, voice prompts, and routing logic. 2. Multichannel Support: The IVR system supports not only voice interactions but also interactions across multiple channels, including chat and email. This versatility ensures a seamless and consistent customer experience across various communication channels. 3. Self-Service Options: Our IVR system offers robust self-service options, allowing callers to access information and perform tasks independently without the need for agent assistance. This includes tasks such as checking account balances, making payments, or accessing FAQs. 4. Skill-Based Routing: NICE inContact's IVR capabilities include skill-based routing, which ensures that calls are directed to the most appropriate agents based on their skills and expertise. This enhances efficiency and customer satisfaction. 5. Integration: The IVR system is seamlessly integrated with our overall contact center software, enabling a unified and streamlined approach to call routing and customer interactions.
41	Describe your authentication processes for verification purposes.	<p>Our authentication processes for verification purposes are designed to ensure the security and privacy of user information. The specific authentication methods we use may vary based on the requirements and preferences of the respective institution or client. However, we commonly utilize a combination of the following attributes for user verification:</p> <ol style="list-style-type: none"> 1. ID Number: Users may be required to provide their unique identification number, such as a student ID or employee ID, to verify their identity. 2. Date of Birth: Confirming the user's date of birth is a common method to establish identity. 3. Home Address: Users may be asked to provide their registered home address as an additional verification step. 4. Last 4 of SSN: The last four digits of the user's Social Security Number can be used as a secure identifier. 5. Phone: Verifying the user's contact number or mobile number can enhance authentication. 6. Semester: Some institutions may use the current or past semester information as part of the verification process. 7. Email: Confirming the user's registered email address is often a part of the verification process. 8. Security Questions: Users may be required to answer predefined security questions, which they previously set up during account registration.

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		<p>9. FERPA Q&A: Questions related to the Family Educational Rights and Privacy Act (FERPA) may be used to verify identity.</p>
42	Describe the ability of clients to listen in and shadow agents in real-time.	<p>Our system offers robust features that enable clients to effectively listen in and shadow agents in real-time through the Supervisor application. Here's an overview of the capabilities:</p> <p>1. Discreet Listening: Clients can discreetly listen to ongoing calls without the contact or agent being aware of their presence. This feature allows for real-time monitoring of agent interactions.</p> <p>2. Call Recording: Our system allows clients to record calls for quality assurance, training, and compliance purposes. These recordings can be valuable for later review and analysis.</p> <p>3. Coaching: Clients have the ability to provide coaching to agents during live calls. This coaching can include guidance, suggestions, or clarifications to ensure that the interaction meets quality standards.</p> <p>4. Barge-In: In situations where it's necessary for both the agent and the contact to hear the client, the barge-in feature allows clients to join the call, making their presence known to both parties.</p> <p>5. Call Takeover: Clients can take over a call when necessary. This feature is especially useful for resolving complex issues or escalating matters to a higher level of expertise.</p> <p>6. Voice Monitoring: Our system provides comprehensive voice monitoring capabilities, ensuring that clients have full visibility into the agent's communication during the call.</p> <p>These features empower clients to actively engage in the monitoring and supervision of agent interactions in real-time. It facilitates quality control, training, and the ability to ensure that interactions align with established standards and objectives.</p>
43	Please describe your current answer rate percentage.	<p>Our current answer rate percentage stands at over 93%. This high answer rate reflects our commitment to ensuring that a substantial majority of incoming calls are promptly answered by our agents. We prioritize efficient call handling and strive to provide timely assistance to our clients and users, resulting in a consistently high answer rate.</p>
44	Do you offer enrollment recruiting support as part of your One -Stop Model? How does that impact pricing?	<p>BlackBeltHelp is committed to supporting Broward College in achieving its goals and initiatives outlined in the solicitation document. We recognize the importance of promoting student, faculty, and staff engagement, creating welcoming campus experiences, addressing inequity, and helping students overcome barriers.</p> <p>Here's how we can contribute to these initiatives:</p> <p>Marketing and Promotion: BlackBeltHelp has a dedicated in-house marketing department ready to support Broward College's goals. We can develop a range of promotional materials to increase awareness and engagement:</p>

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		<ul style="list-style-type: none"> • Banner Ads: Customized banner ads that can be prominently displayed on the Broward College website to attract attention to important initiatives. • Social Media Posts: Engaging social media posts across various platforms, complete with customized graphics, to promote events and initiatives. Social media is a powerful tool for reaching and engaging with the college community. • Customized Email Templates: Tailored email templates that Broward College can use to effectively communicate and advertise these initiatives to their audience. • Press Releases: We can craft and distribute press releases via newswire services to generate additional publicity and media coverage for Broward College's initiatives. • Blog Posts: Informative and engaging blog posts focused on promoting and increasing awareness of Broward College's various initiatives. These can be published on the college's website or shared through other channels. • Webinars: Collaboration with Broward College faculty to host webinars that showcase the initiatives and drive awareness across the higher education community. <p>Our marketing and promotional efforts aim to create a buzz around Broward College's initiatives, engage the community, and ultimately contribute to the success of these important goals. We believe that by working together, we can make a meaningful impact on student success and community enrichment.</p>
45	<p>Please provide at least two (2) examples of how you've helped previous clients increase student enrollment. Please include details of how the metrics were calculated.</p>	<p>Our focus is on providing excellent support to clients to enhance their overall operations and the satisfaction of their students or users. While we don't directly influence student enrollment numbers, we do play a crucial role in improving the student experience and satisfaction, which will indirectly contribute to increased enrollment. Here are two examples of how we've helped previous clients improve their operations:</p> <p>1. Increased Student Satisfaction Rate:</p> <ul style="list-style-type: none"> • Situation: One of our clients in the higher education sector was struggling with low student satisfaction rates due to challenges in providing timely support and assistance to students. • Solution: We implemented a comprehensive support strategy, including dedicated OneStop and IT Help Desk support services. • Results: The client experienced a significant improvement in their student satisfaction rate, as measured through post-interaction surveys and feedback mechanisms. Students reported higher levels of satisfaction with the support they received, leading to a more positive overall experience. <p>2. Enhanced OneStop Student and IT Help Desk Support:</p> <ul style="list-style-type: none"> • Situation: Another client faced issues with their existing OneStop and IT Help Desk support, resulting in long response times and dissatisfaction among students and staff.


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		<ul style="list-style-type: none"> • Solution: We revamped their support services, providing dedicated agents with expertise in OneStop and IT support. We also implemented efficient ticketing and tracking systems. • Results: The client saw measurable improvements in key performance indicators (KPIs), such as reduced response times, higher first-call resolution rates, and improved ticket handling efficiency. These improvements contributed to an overall enhancement of the user experience, which can indirectly impact student retention and enrollment.
46	<p>Please provide at least two (2) examples of how you've used data to guide business solutions to reduce incoming volume.</p>	<p>Our regular Weekly/Monthly/Quarterly Reports are designed to keep our clients updated on crucial metrics, including Volume, ASA (Average Speed of Answer), AHT (Average Handle Time), and Net abandoned for Email, phone, and chat interactions. These reports serve as a valuable resource to help the client make informed decisions regarding the interaction management strategy. Please refer to the scenarios mentioned below where BlackBeltHelp has helped its clients to reduce the incoming volume by using the data:</p> <p>Scenario 1: if a client notices that the email interactions are consuming more volume than phone interactions, they can adjust the strategy accordingly. Our clients have found it beneficial to reallocate resources or manage email volume internally to optimize interaction usage and incoming volume.</p> <p>Scenario 2: The key strategy to optimize the interaction volume is to introduce self-help options, particularly for frequent tasks like password resets. If the password reset requests are consuming a significant portion of the interaction volume, implementing self-help steps can be an effective solution.</p> <p>We help the client set up an IVR (Interactive Voice Response) system that guides users through self-help steps for common tasks before connecting them with an agent. Enabling clients to resolve routine issues independently can significantly reduce interaction volume. This approach not only enhances efficiency but also provides your customers with a quicker resolution, improving overall satisfaction.</p>
47	<p>Please describe how end users would access your live chat support function (i.e., is this offered on a separate website or built into client portals?).</p>	<p>Accessing our live chat support function is designed to be user-friendly and seamlessly integrated into the client's online presence. Here's how end users can access our live chat support:</p> <p>1. Website Integration: We offer a JavaScript code snippet that can be easily integrated into the client's website. This code can be added to the website's footer section, ensuring that users can access live chat from any page of the website.</p> <p>2. Portal Integration: In addition to website integration, our live chat support function can also be integrated into client portals. Whether it's an educational institution's student portal or a corporate client's employee portal, users can access live chat without navigating away from their secure portals.</p>
48	<p>Describe Broward College's ability to moderate and request quality reviews.</p>	<p>Broward College's commitment to maintaining high service standards and continuous improvement is reflected in our collaborative quality assurance efforts. Here's how we enhance our ability to moderate and request quality reviews:</p> <p>Root Cause Analysis (RCA): Broward College has the autonomy to select any ticket for review, especially those that require special attention. We prioritize providing comprehensive root cause analyses, along with recordings, when</p>

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		<p>necessary, to facilitate thorough quality assessments. This proactive approach ensures that issues are not only addressed but also thoroughly analyzed to prevent recurrence.</p> <p>Weekly Calibration Sessions: We propose weekly calibration sessions that bring together representatives from both Broward College and BlackBeltHelp. During these sessions, we review and discuss random calls, fostering a collaborative environment for feedback exchange. This process aligns everyone on quality expectations and provides valuable insights for improving service delivery. It's a collective effort to ensure consistent and exceptional support.</p> <p>Weekly Ticket Audit: BlackBeltHelp's team will regularly compile and share a weekly ticket review report with Broward College. This report offers a detailed breakdown of each issue, categorized by type, providing transparent visibility into our support activities. This proactive reporting empowers Broward College with insights into the support provided, the issue of the ticket, and the current status.</p> <p>These measures not only ensure that Broward College receives top-tier support but also provide the institution with greater visibility and control over service quality. Our commitment to collaboration and transparency underscores our dedication to continuous improvement and exceptional service delivery.</p>
49	Describe your digital support channels (i.e., social media, website FAQs, mobile apps, chatbots/virtual assistants).	<p>We are continuously evolving and expanding our digital support channels to provide a seamless and comprehensive support experience for our clients and their end-users. Here's an overview of our digital support channels:</p> <ol style="list-style-type: none"> 1. Live Chat: Our live chat support allows end-users to connect with our agents in real-time through the client's website or portal. Users can ask questions, seek assistance, and get immediate responses. Our live chat service is designed for convenience and efficiency. 2. Chatbots/Virtual Assistants: We are actively developing and deploying chatbot and virtual assistant solutions to enhance self-service options. These AI-powered tools can handle routine inquiries, provide quick answers, and guide users through common processes, freeing up our human agents to focus on more complex issues. 3. Social Media: We are equipped to provide social media support through different channels. These channels will enable users to reach out for assistance via platforms such as Facebook, Twitter, and LinkedIn. However, it's important to note that our past experience has shown that institutions are often cautious about sharing their students' or users' Personal Identifiable Information (PII) on such platforms, in accordance with FERPA and other state laws. 4. Website FAQs: We work closely with our clients to create and maintain comprehensive Frequently Asked Questions (FAQs) sections on their websites. These FAQs serve as a valuable self-help resource for end-users, allowing them to find answers to common queries without the need for direct contact. 5. Mobile Apps: While not currently available, we are planning to provide support through mobile apps in the near future, ensuring that end-users can access assistance and information on the go.
50	Describe how you manage and control security around customer data and how you would handle a security breach.	<p>BlackBeltHelp is ISO 27001:2013 certified. BlackBeltHelp recognizes the importance of and is familiar with the requirement for security and confidentiality of client and student information. Systems and procedures are in place to ensure that client and student data are always safeguarded. This ranges from technology to staff training to continuous management monitoring. FERPA training is the first course new agents take when joining the BlackBeltHelp team. Agents must pass a FERPA certification exam before proceeding to any other coursework. A 100%</p>

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		<p>score is required on the FERPA exam, and agents must re-certify annually to remain employed.</p> <p>In addition, our product does not disclose any user's personal information until a client wants our product to do so.</p> <p>As per the protocols defined by the client, if our product must disclose any user personal information – no information is disclosed unless the user has been authenticated. There are multiple ways to authenticate the user:</p> <ul style="list-style-type: none"> • Authenticate using LDAP credentials • Provide answers to security questions  <p>BlackBeltHelp safeguards Sensitive Data according to all commercially reasonable administrative, physical, and technical standards (e.g., such standards established by the National Institute of Standards and Technology or the Center for Internet Security); Continually monitors its operations and takes any action necessary to ensure the Sensitive Data is safeguarded.</p> <p>We only use, reuse, distribute, transmit, manipulate, copy, modify, access, or disclose the Institution Data to the extent necessary for BlackBeltHelp to implement and maintain the System. BlackBeltHelp shall hold the Institution's Data in confidence and protect the Institutional Data to the same extent and in at least the same manner as BlackBeltHelp protects its own data, but in no case in a lesser manner than a reasonable degree of care under the circumstances.</p>
51	Describe if your organization is SOC 2 compliant and how compliance is met.	BlackBeltHelp uses best-of-breed tools Salesforce® (NYSE: CRM), a cloud-based ticketing system that allows us to track, produce, and customize customer service reports for each service area, along with customer satisfaction surveys, in both real-time and historical. NICE inContact® (NASDAQ: SAAS), a cloud-based interaction management system that routes all calls, mail, chat, and web forms to BlackBeltHelp agents. Both these tools are SOC 2 Type 2 compliant, and reports of the same are attached below for your reference.
52	Describe your organization's retention rate with employees pre- and post-pandemic.	Our organization boasts a strong employee retention rate, both pre- and post-pandemic. Prior to the pandemic and continuing through to today, our retention rate has consistently exceeded 95%.
53	Do you offer live support through social media channels, and how is the support handled?	<p>We highly prioritize our commitment to offering comprehensive support across multiple channels, including social media. While we do have the capability to provide live support through social media, it's important to note that our past experience has shown that institutions are often cautious about sharing their students' or users' Personal Identifiable Information (PII) on such platforms in accordance with FERPA and other state laws. Nevertheless, we recognize the invaluable role of social media in real-time engagement with clients and users.</p> <p>Our dedication of continual improvement remains unwavering, and we are always exploring ways to meet and exceed the expectations of our clients and users. The inclusion of live support through social media remains a significant goal in our pursuit of excellence, and we are always open to exploring solutions that ensure the security and privacy of sensitive information while enhancing the support experience.</p>

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54	Do you offer a data warehouse that clients can leverage?	At BlackBeltHelp, we prioritize data security and privacy. While we don't offer a standalone data warehouse for clients to leverage, we take extensive measures to protect and manage data responsibly. We utilize Salesforce as a platform to securely store personally identifiable information (PII) for authentication purposes. This approach ensures that sensitive data is handled with the utmost care, maintaining the highest standards of data security and compliance. Our focus is on safeguarding client information and providing a secure environment for all interactions.
55	Describe how you handle an irate customer.	Our contact center agents are trained to handle irate customers with professionalism, empathy, and a commitment to finding solutions. Our goal is to turn a negative experience into a positive one, leaving the customer feeling heard and valued.
56	What training are agents provided to handle emergency/threatening situations?	<p>Training is a most imperative part of our Call Center solution. Our staff undergoes a rigorous 5-week new hire training program, and further receives specialized training in all aspects of Student Services support, including but not limited to Financial Aid, Advising, Accounts Receivable, Admissions and Enrollment, Registration, etc. Then, they are specifically trained on the applications/departments they are going to support as per the client's requirement. Agents who get certified act as full-time permanent employees.</p> <p>We use an iterative training process that solidifies an agent's understanding of the client. . This repetition is one of the best ways to enforce a framework of understanding for an agent, and to deliver consistent quality on a day-to-day basis over the length of the contract and beyond.</p> <p><u>Training for supporting Broward College's end-users:</u></p> <p>Our team will spend the required amount of time with Broward College's subject matter experts to define & maintain processes, workflows, escalation procedures, and to learn the necessary skills to become a trainer to the rest of the support team. We will then prepare a knowledge base and discovery documents and get them approved by Broward College.</p> <p>We will go through Broward College's current Knowledge Base (KB) and design a training program in coordination with Broward College to understand your processes and procedures to ensure that all our agents receive the needed resources to provide excellent service. We create custom LMS modules in our hosted environment that offer a consistent training program for each client, as well as internal and general topics. We will provide agents with 2-3 weeks of Broward College-specific training that will address the applications, technologies, systems, and practices being used by Broward College.</p> <p><u>New hire staff training includes:</u></p> <ul style="list-style-type: none"> • FERPA Training & Assessment • BlackBeltHelp Internal Systems Training & Assessment • Higher Education Training & Assessment <ul style="list-style-type: none"> ○ Financial Aid ○ Advising ○ Accounts Receivable ○ Admissions and Enrollment ○ Registration ○ Information Technology

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		<ul style="list-style-type: none"> • Applications Training & Assessments • Broward College-specific Training with Activities & Assessment • 2024 Rush Prep Training • New Student FAQ's • Expected call types • 2024 Rush Assessment <p><u>FERPA training includes:</u></p> <p>This is the first course new agents take when joining the BlackBeltHelp team. Agents must pass a FERPA certification exam before proceeding to any other coursework. A 100% score is required on the FERPA exam, and agents must re-certify annually to remain employed. FERPA Training covers the topics outlined below:</p> <ul style="list-style-type: none"> • What is FERPA • Student Rights • Student Education Records • FERPA Rules about Education Records • Student Access to Educational Records • Records Released Without Consent • Legitimate Educational Interest Defined • What FERPA does NOT Protect • Enforcement of FERPA • FERPA at BlackBeltHelp • FERPA Exam <p>All training modules (new hire, security, refresher, uptraining) are uploaded on our hosted LMS application. Upon completion of each training module, the representatives have to complete the assessments in the presence of the trainer. The LMS application helps us track the scores and certification of each representative.</p>
57	Describe your organization's ability to handle retention-based student engagement efforts.	<p>BlackBeltHelp has the tools necessary to handle retention-based student engagement efforts. Our organization is uniquely positioned to provide comprehensive support services that will contribute to student success and retention. Here's how we can achieve this:</p> <p>1. Personalized Support: We offer personalized support to students, recognizing that individualized attention can significantly impact retention rates. Our dedicated team of advisors will engage with students, thereby addressing their specific needs and concerns.</p> <p>2. Data-Driven Approach: Leveraging data analytics and insights, it would be possible to identify at-risk students and proactively intervene to provide the necessary support. This data-driven approach would help the college to effectively target its retention efforts.</p> <p>3. Early Alert Systems: We have the ability to develop and implement an early alert system for Broward College that would identify students who may be facing academic or personal challenges. This timely identification would enable</p>

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		<p>Broward College to reach out and offer assistance, helping students overcome obstacles to success.</p> <p>4. 24/7 Availability: Our services are available 24/7, ensuring that students can access support whenever they need it. Whether it's academic guidance, technical assistance, or general inquiries, our team is ready to assist around the clock.</p> <p>5. Proactive Communication: We have the messaging tool needed to proactively communicate with students through various channels, including text, email, and chat. Our goal is to keep students informed, engaged, and motivated throughout their academic journey.</p> <p>6. Resourceful Knowledge Base: We maintain a comprehensive knowledge base that students can access to find answers to common questions and challenges. This self-service resource empowers students to resolve issues independently when possible.</p> <p>7. Multichannel Support: Our multichannel support approach ensures that students can reach out through their preferred communication method, whether it's phone, email, chat, or self-service portals.</p>
58	Describe your disaster plan in the event of service outages.	<p>At BlackBeltHelp, we take service outages and disaster planning seriously to ensure uninterrupted support for our clients. Here is an overview of our disaster plan.</p> <p>High Uptime: We maintain an impressive uptime rate of 99.99%, ensuring that our services are consistently available to clients.</p> <p>Redundant Physical Contact Centers: BlackBeltHelp operates resource-independent physical contact center locations, which means that even if one location experiences an outage, another contact center is readily available to handle the workload.</p> <p>Dual ISP Links and Redundancy: Each contact center location is equipped with dual Internet Service Provider (ISP) links configured in an active-active setup. This redundancy extends to critical networking components such as Cisco® firewalls, routers, and switches, as well as Uninterruptible Power Supplies (UPS).</p> <p>Automatic Call Routing: In the event of an outage at one contact center, calls are automatically rerouted and handled by another contact center that utilizes NICE inContact® (interaction management system) and Salesforce® (optional ticketing system). This seamless transition ensures that our clients' support services continue uninterrupted.</p> <p>Cloud-Based Platforms: Our core platforms, including NICE inContact® and Salesforce®, are cloud-based. This architecture allows us to maintain business-as-usual operations, with all historical data, call flows, ticket data, and reporting remaining intact during any potential outage.</p> <p>Geographical Diversity: BlackBeltHelp's contact center agent teams are located across the United States, including Chicago, IL; California; Somerset, KY; and</p>

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		<p>Cleveland, OH. This geographical diversity further enhances our ability to provide continuous support.</p> <p>System Architecture: We have implemented a robust system architecture that integrates our telephony, interaction management platform (NICE inContact®), optional ticketing system (Salesforce®), and contact centers. This architecture is designed to ensure redundancy and minimize the risk of complete system failure.</p> <p>Scenario Assessment: BlackBeltHelp has never experienced a complete system failure. The events that would result in a system failure are highly unlikely and would include simultaneous power outages in all locations or the simultaneous failure of all contact center networks.</p> <p>In summary, BlackBeltHelp's disaster plan is comprehensive and designed to guarantee uninterrupted service to our clients. We have implemented redundancy, cloud-based platforms, and a geographically diverse agent team to mitigate risks and maintain the highest level of service reliability, even in the face of unforeseen challenges.</p>
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FEATURES CHECKLIST – ATTACHMENT M

Item	Contact Center Feature	Available	Not Available	Comments (if applicable)
1	15 minute historical reporting intervals	X		
2	Ability to scale with minimal risk - agents	X		
3	Ability to scale with minimal risk - contact volume	X		
4	Ability to scale with minimal risk - skills	X		
5	Ad hoc report creation	X		
6	After interaction (omnichannel) survey and reporting data	X		
7	Agent assist	X		
8	Agent call presence	X		
9	agent internal chat	X		
10	Agent queue stat display	X		
11	Agent screen activity recording	X		
12	agent whispering	X		
13	AHT reporting	X		
14	Alarm notification, escalation, and routing capabilities	X		
15	Answer detection	X		
16	ASA reporting	X		
17	Automated Dialing: predictivem, progressive, preview	X		
18	Automated intelligence chat bot	X		
19	Automatic answer capabilities to E mails	X		
20	Automatic Call Distribution (ACD)	X		
21	automatic file retrieval	X		
22	Availability of pre-configured versions of common CRM (TargetX, EAB, Workday, etc.)	X		
23	Broadcast messaging and notifications to agent groups	X		
24	Business process management (BPM) for customer service	X		
25	Call barging	X		
26	Call campaign creation (inbound and outbound)	X		
27	Call monitoring and tracking	X		
28	Case aging reporting	X		
29	Case response time reporting	X		
30	Client coaching requests and reporting	X		
31	Client customized hold menu	X		
32	Client customized IVR capabilities	X		
33	Comprehensive performance tools	X		
34	Contact Center All-in-One Suites	X		
35	Contact Center as a Service (Cloud)	X		
36	contract compliance reporting	X		
37	CRM integration capabilities	X		

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38	CSAT & NPS score reporting	X		
39	CTI capabilities and implementation methods	X		
40	Customized agent scripting tools	X		
41	Data warehousing	X		
42	Dedicated Agents (blended) for inbound/outbound interactions	X		
43	Dedicated Agents (non-blended) for inbound/outbound interactions	X		
44	Discreet agent listening	X		
45	Dynamic integration framework	X		
46	Dynamic menus based on caller profile	X		
47	Email, Chat and SMS digital support channels	X		
48	Emotion Detection/Recognition	X		
49	First Contact Resolution (FCR) reporting	X		
50	FIFO queuing	X		
51	Fraud & Identity analytics	X		
52	Graphical and tabular report formats	X		
53	Inbound and Outbound call capabilities	X		
54	Incoming call screen-pop with caller information	X		
55	Inteligent IVR	X		
56	Interaction journey analytics	X		
57	Interactive Voice Response (24/7/365) system for call routing and deflection	X		
58	IVR self help reporting	X		
59	Key Performance Indicators (KPI) match to business drivers	X		
60	Knowledge management creation and support	X		
61	Live and historical call queue stats on desktop	X		
62	live and historical call reporting analytics (frequency, day, hour, contact type)	X		
63	Live and real time contact center reporting	X		
64	Live call transfer	X		
65	Mediated Interaction Matching	X		
66	Multi-lingual omnichannel support	X		
67	Multiple export formats (CSV, PDF, HTML, XML, etc)	X		
68	Multiple IVR Limited Speech Recognition (LSR) languages	X		
69	Multiple IVR self-service for read and announce of customer database information	X		
70	New application and services enablement.	X		
71	On-demand and real-time call recording with client access	X		
72	On-screen live display of KPIs (AHA, ASA, FCR, etc.)	X		
73	Open APIs	X		
74	Open standards adoption	X		
75	Performance management	X		
76	Personalized queues and priority routing	X		

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77	Predictive analytics	X		
78	Priority and complinace alerts systems	X		
79	Quality management and client agent coaching	X		
80	Real-time and historic central dashboards for reporting	X		
81	Real-time and Historic Exportable data	X		
82	Real-time and on-demand chat transcriptions reporting	X		
83	Real-time supervision	X		
84	Real-time visable and reporting thresholds	X		
85	Repeat caller analysis	X		
86	SDK or API available for custom integration	X		
87	Self Service & AI Automation	X		
88	Self-service financial aid status tracker	X		
89	SIS integration capabilities	X		
90	Skills based call routing	X		
91	Smart call routing	X		
92	Smartphone and mobile app intergrations	X		
93	Social Media digital support channels	X		
94	Speech and text anaytics	X		
95	Third party tool integration	X		
96	Toll-free phone numbers	X		
97	Tools to assess the IP Telephony network and applications	X		
98	Video chat digital support channel	X		
99	Virtual agent	X		
100	Web click-to-talk	X		
101	Workforce Management	X		

ACCOUNTABILITY KEY PERFORMANCE INDICATORS – ATTACHMENT N

KEY PERFORMANCE INDICATORS, METRICS AND MANAGEMENT REPORTS		RESPONDENT REPLY (Responses such as “complies” or “agrees” are not sufficient)
1	Service Level (x% of calls answered within x seconds)	>=80% of calls answered in 90 seconds monthly
2	First Call Resolution Rate	>=90% on a monthly basis
3	Average Speed of Answer (ASA)	Phone: 90 Seconds, Email/Tickets: 120 Minutes, Live Chat: 180 Seconds
4	Average Handle Time (AHA)	8 Mins for IT/LMS HD and 7 Mins for OneStop
5	Answer Rate	>=93%
6	Abandoned Rate	<=7%
7	Average Time to Abandon	The calls will get disconnected if the user disconnects
8	Average Queue Time	<=60 Secs Monthly
9	Total Calls & Chats Offered	We handle over 1.3 million calls every year
10	Total Calls & Chats Handled	>=93%
11	Average After Call Wrap-up Time	2-3 Mins
12	Average Idle Time Per Agent	15-30 Secs
13	Average # of Calls Handled Per Agent Per Day	20-40 calls for IT and 25-50 Calls OneStop (The lower range is generally applicable for over-night shifts)
14	Average # of Calls Abandoned Per Day	<=7%
15	After-call/chat Survey Customer Effort Scores (CSAT)	>=85% Monthly Standard
16	Case Response Time and Case Aging Reports	Yes, we do provide through our ticketing instance
17	Default User Ticket Details	Yes, we provide user ticket details on a monthly basis (standard)
18	Self-Help IVR Track Reports	Don't provide now, however, it is possible though integrating our Voicebot with our telephony system. Yes, reporting is available

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19	Calls Frequency by Contact Type	Yes, through our NICE inContact
20	Call Frequency by Day and Hour	Yes, through our NICE inContact
21	Percentage and details of Repeat Caller Reports	We do it per our client's requirement
22	Percent productive time for everyone (total staff time - auxiliary time)/total staff time	>=80%
23	Percent available and unavailable/project time by individual	<=20%
24	Busy Hour Call Attempts (BHCA)	100% (Attempt to receive all interactions during the entire year)
25	Average Total # of Calls Resolved Per Month: (chat, email, phone)	>=90% monthly
26	Average Total # of Call Received on First Call by First Responding Agent	>=80% monthly Standard

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PRICE RESPONSE FORM

TAB 9

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

PRICE RESPONSE FORM - ATTACHMENT B

ITN-2023-055-TP - CONTACT CENTER SERVICES

ATTACHMENT B - PRICE RESPONSE FORM

Respondent: BlackBeltHelp LLC

Pricing should be all inclusive and contain a description of all features, metrics, reports, key performance indicators, etc. included in your pricing as indicated in Attachments A, M, and N.

MONTHLY RECURRING FEES	Estimated Monthly Price	Estimated Yearly Price	Estimated Contract Price (3 Years)
Software (Licensing)		\$0	\$0
Other: AI Chatbot & Voicebot	\$3,333	\$40,000	\$120,000
		\$0	\$0
		\$0	\$0
		\$0	\$0

INSTRUCTIONS: Vendor can list as many features as necessary, add additional rows as needed. Vendor must fill Column B and maintain formulas in Column C and D, which will autopopulate.

TIER BASED INCIDENT PRICING (BLENDED OMNICHANNEL)	Unit Price
Handled One Stop and Help Desk Volume Annual Incidents 200,000 or less	\$ 4.25
Handled One Stop and Help Desk Volume Annual Incidents 200,000 - 250,000	\$ 4.25
Handled One Stop and Help Desk Volume Annual Incidents 250,000 and greater	\$ 4.25
ONE-TIME FEES	Unit Price
SIS Integration	\$0.00
Design and Implementation	\$10,000.00
Start-Up Fee	\$0.00
Professional Services:	\$0.00
Other:	
Other:	
TOTAL ESTIMATED ONE-TIME FEES:	\$10,000.00

NOTE: In a separate page and annexed as page 2 to this attachment, provide the following:

1. Describe your Omnichannel price model (for example, cost per interaction, interaction volume pricing based on tiered structure or channel type, inbound, outbound, etc.).
2. Describe your pricing methodology (for example, functionality priced per agent/per month, per interaction/per month, etc.).
3. Any additional comments/clarifications to your price response form.

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FINANCIAL CAPACITY

TAB 10

FINANCIAL CAPACITY

Respondents shall submit Dun & Bradstreet Number (D-U-N-S). The College will use the total of both the D&B Delinquency Predictor Score (formerly the Commercial Credit Score - CCS) and the D&B Failure Score (formerly the Financial Stress Score - FSS) reports in order to assess financial capacity of Respondent.

Response: BlackBeltHelp recently registered at D&B and our DUNS# is 13-037-2765. Due to the recent registration this DUNS may reflect limited information therefore, it should not be treated as the sole criterion to assess a company's financial viability.

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ATTACHMENTS

TAB 11

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

DRUG-FREE WORKPLACE CERTIFICATION – ATTACHMENT D

**BROWARD COLLEGE ITN-2023-055-TP
DRUG-FREE WORKPLACE CERTIFICATION ATTACHMENT D**

SWORN STATEMENT PURSUANT TO SECTION 287.087, FLORIDA STATUTES, AS CURRENTLY ENACTED OR AS AMENDED FROM TIME TO TIME, ON PREFERENCE TO BUSINESSES WITH DRUG-FREE WORKPLACE PROGRAMS.

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the College,

by Anthony R. Humphreys, President
(Print individual's name and title)

for BlackBeltHelp LLC
(Print name of entity submitting sworn statement)

whose business address is 936 SW 1st Ave., Suite 412, Miami, Florida - 33130

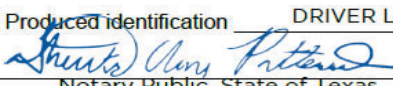
and (if applicable) its Federal Employer Identification Number (FEIN) is 82-5281863
(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: _____.) I certify that I have established a drug-free workplace program and have complied with the following:

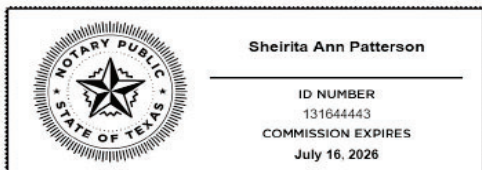
1. Published a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Informed employees about the dangers of drug abuse in the workplace, the business' policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Given each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notified the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five days after such conviction.
5. Will impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.
6. Am making a good faith effort to continue to maintain a drug free workplace through implementation of this section.

Texas
Harris 
(Signature)

Sworn to and subscribed before me this 21st day of September, 2023.

Personally Known N/A

OR Produced identification DRIVER LICENSE Notary Public - State of Texas
 My commission expires 07/16/2026
Notary Public, State of Texas Sheirita Ann Patterson
(Type of identification) DRIVER LICENSE
(Printed, typed or stamped commissioned name of notary public)



FORM: #4530 3/93

Notarized online using audio-video communication

INFORMATION SECURITY AFFIDAVIT – ATTACHMENT E

**Broward College
Information Security Affidavit**

I, Anthony R. Humphreys [Name], the designated signing manager for BlackBeltHelp LLC [Organization], attest to the best of my knowledge, that we completed the following tasks to detect, prevent, and mitigate loss due to an information security breach or identity theft related incident.

A.H.
Initials

1. My organization has attached the most recent SOC 2 audit report attesting to our internal security controls. **In lieu of a 3rd party audit report we agree to provide an EDUCAUSE HECVAT or a CSA CAIQ assessment.** Additional audit reviews or documents may be attached to assist in the vendor risk management review process:

- ◆ Information Security Policy
- ◆ Physical Security Policy
- ◆ ISO Certification
- ◆ PCI Certification

A.H.
Initials

2. My organization has reasonable security measures to protect sensitive data in both hard copy and electronic formats. This would include clean desk policies and locked cabinets where documents may reside. We also ensure that all sensitive data stored on systems under our control will be encrypted while at rest and in transit. Prior to disposal, systems will be wiped using the NIST 800-88 standard. **Broward College sensitive data includes but is not limited to the following:**

- ◆ Personally Identifiable Information (SSN, DOB, Driver’s License Number, Passport Information)
- ◆ Medical Information (Medical Records, Doctor Names and Claims, Prescription Information)
- ◆ Academic Information (Transcripts, Grade Information)
- ◆ Business Information (Federal ID Numbers, Security Systems, Employee Identifiers, Passwords)
- ◆ Financial Information (Credit Card Information, Bank Account Numbers)

A.H.
Initials

3. My organization is aware of the obligation to adhere to the same information security requirements that the College must adhere to under the common privacy regulations. This is specific to information that we may have direct or indirect access to as part of our services.

- ◆ Family Educational Rights and Privacy Act (FERPA)
- ◆ Fair and Accurate Credit Transactions Act (FACTA)
- ◆ Payment Card Industry (PCI)
- ◆ Health Insurance Portability and Accountability Act (HIPAA)
- ◆ Gramm-Leach-Bliley Act (GLBA)
- ◆ General Data Protection Regulation (GDPR)

A.H.
Initials

4. My organization conducts background checks on all employees that may access sensitive data belonging to the College. We also ensure that employees are trained in information security best practices prior to completing work on behalf of the College.

- ◆ Information Security Awareness Training
- ◆ Background Checks Filed for All employees
- ◆ Common Privacy Regulation Training (PCI, GLBA, HIPAA)

I AGREE THAT I HAVE ANSWERED THE ABOVE QUESTIONS TRUTHFULLY TO THE BEST OF MY KNOWLEDGE.

I AGREE TO MAKE A GOOD FAITH ATTEMPT TO PROTECT ALL INFORMATION MY BUSINESS HANDLES ON BEHALF OF BROWARD COLLEGE.

I UNDERSTAND AND AGREE THAT BROWARD COLLEGE MAY REQUEST VERIFICATION AS NEEDED TO ENSURE THAT WE MEET THE MINIMUM SECURITY REQUIREMENTS

X Anthony R. Humphreys

Title President

Date 09/01/2023

NON-DISCLOSURE AGREEMENT – ATTACHMENT F



NON-DISCLOSURE/PROPRIETARY INFORMATION AGREEMENT

It is understood that it is the mutual desire of both The District Board of Trustees of Broward College, Florida with a principal place of business at 111 East Las Olas Boulevard, Fort Lauderdale, Florida 33301 (hereinafter referred to as “College”), and _____ with a principal place of business at _____ (hereinafter referred to as “Contracting Entity/Person”) to disclose certain confidential information pursuant to this agreement (“Agreement”).

College shall be: A Disclosing Party A Receiving Party Both
Contracting Entity/Person shall be: A Disclosing Party A Receiving Party Both

The specific purpose of the disclosure of confidential information is _____

The confidential information to be supplied under the provisions of this Agreement relates to _____

Confidential information includes any and all information, whether oral, written, in a physical embodiment or otherwise, which is disclosed for the purpose as set forth above and which is identified by the Disclosing Party at the time of disclosure as being proprietary. Information transmitted in writing must be marked “Proprietary,” or “Confidential” or other similar designation in order for it to be covered under this Agreement. Information transmitted orally or visually and identified at the time as being proprietary shall be confidential information covered under this Agreement if it is identified at the time of disclosure by the Disclosing Party as being confidential or proprietary and thereafter reduced to writing by the Disclosing Party, confirming in the writing that the information is confidential or proprietary, and such writing is transmitted to the Receiving Party within ten (10) days after the oral or visual disclosure of the information.

1. The Receiving Party Agrees:
 - a. To use the confidential information only for the purpose set forth above.
 - b. To treat the information as being confidential and to protect the information with no less standard of care than the Receiving Party uses to protect its own confidential information.
 - c. To restrict circulation and disclosure of the confidential information to its employees, directors, officers or attorneys who have a need to know in connection with the purpose of the disclosure as set forth above, and to ensure that such persons are informed of the confidential nature of such information.
 - d. To hold such confidential information in confidence, and not to disclose the confidential information to any other party without the written authorization of the Disclosing Party.
 - e. To return or destroy the confidential information promptly upon request of the Disclosing Party, or, in any event, upon termination or completion of this Agreement, together with any and all copies, negatives, or reproductions thereof. One copy may be retained for archival purposes.

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

2. The Disclosing Party acknowledges that Receiving Party shall not be liable for disclosure or use of the confidential information which:
 - a. Was in the public domain at the time of its disclosure or becomes part of the public domain subsequent to time of disclosure under this Agreement through no fault of the Receiving Party; or
 - b. Was known to the Receiving Party at the time of disclosure; or
 - c. Is disclosed with the written approval of the Disclosing Party; or
 - d. Is independently developed by the Receiving Party without the use of the confidential information; or
 - e. Is rightfully furnished to the Receiving Party by a third party; or
 - f. Is disclosed by the Disclosing Party to others on a non-restricted basis; or
 - g. Is disclosed as required by law or judicial action.
3. This Agreement shall come into force as of the date of signature of the last party to sign the Agreement and shall be for a term of one (1) year thereafter; provided, however, that either party upon thirty (30) days' written notice to the other party, may terminate this Agreement on an earlier date. The Receiving Party agrees that during the term of this Agreement and for a period of three (3) years after the earlier to occur of this Agreement's expiration or termination, the Receiving Party shall not disclose the Disclosing Party's confidential information in contravention to the requirements of this Agreement nor shall the Receiving Party use such confidential information for any purpose other than as permitted by this Agreement.
4. The Receiving Party agrees that all confidential information of the Disclosing party shall remain the property of the Disclosing party, and that the Disclosing Party may use such confidential information for any purpose without obligation to the Receiving Party. No license, express or implied, in the Disclosing Party's confidential information is granted to the Receiving Party other than to use the confidential information in the manner and to the extent authorized by this Agreement. Nothing in this Agreement obligates either party to proceed with any transaction between them, and each party reserves the right, in its sole discretion, to terminate the discussions contemplated by this Agreement at any time.
5. None of the confidential information which may be submitted and/or exchanged by the parties shall constitute any representation, warranty, assurance, guarantee or inducement by either party to the other with respect to the infringement of trademarks, patents, copyrights or any right of privacy, or any rights of third persons.
6. This Agreement shall be deemed to be a contract made under the laws of the State of Florida and for all purposes it, plus any related supplemental documents and notices shall be construed in accordance with and governed by the laws of such state. In no event shall either party be entitled to indirect, punitive or consequential damages relating to this Agreement.
7. This Agreement constitutes and expresses the entire agreement and understanding between the parties as relates to the subject matter contained in this Agreement and supersedes any previous discussions,

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

promises, representations, and understandings relative thereto, if any.

- 8. Nothing in this Agreement will prevent College from complying with the requirements of Chapter 119 and Section 1004.22(2) of the Florida Statutes regarding disclosure of public documents.
- 9. To the extent applicable each party shall comply with (a) all regulations promulgated by the Office of Foreign Assets Control, Department of the Treasury; (b) the International Emergency Economic Powers Act, 50 U.S.C. Section 1701 et seq., (c) the Trading with the Enemy Act, 50 U.S.C. App. I et seq.; and (d) the September 24, 2001 Executive Order Blocking Property and Prohibiting Transactions with Persons Who Commit, Threaten to Commit, or Support Terrorism and laws which replace any such laws if any such laws are repealed or modified (collectively, the "OFAC Laws")."
- 10. The undersigned individuals executing this Agreement hereby represent and warrant that they have the authority to enter into this Agreement on behalf of their respective entity.
- 11. If either party loses or makes unauthorized disclosure of the other party's confidential information, it shall notify such other party immediately and take all steps reasonable and necessary to retrieve the lost or improperly disclosed information.
- 12. This Agreement shall bind and inure to the benefit of the parties hereto and their successors and assigns. Neither party may assign this Agreement without the prior written consent of the other party. This document contains the entire and exclusive agreement between the parties with respect to the subject matter hereof. Parole or extrinsic evidence shall not be used to vary or contradict the express terms of this Agreement, and recourse may not be had to alleged dealings, usage of trade, course of dealing, or course of performance to explain or supplement the express terms of this Agreement. Any party's failure to enforce any provision of this Agreement shall not constitute a waiver thereof or of any other provision by that party. This Agreement may not be amended or modified except by a writing signed by both parties hereto. This Agreement may be executed in any number of counterparts, each of which shall be an original, but all of which together shall constitute one instrument.

In witness whereof, the duly authorized representative of each party has caused this Agreement to be duly executed on the dates set forth under their names, effective as of the date last signed below.

**The District Board of Trustees of
Broward College, Florida**

Contracting Entity/Person

By: _____
 Name: _____
 Title: _____
 Date: _____

By: _____
 Name: _____
 Title: _____
 Date: _____

Read and acknowledged:

By: BlackBeltHelp LLC
 Name: Anthony R. Humphreys
 Title: President
 Date: 09/01/2023

PUBLIC ENTITY CRIMES STATEMENT – ATTACHMENT G

**BROWARD COLLEGE | ITN-2023-055-TP
PUBLIC ENTITY CRIMES STATEMENT | ATTACHMENT G**

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for CATEGORY TWO for a period of thirty six (36) months from the date of being placed on the convicted vendor list. See Section 287.133(2) (a), Florida Statutes.

A “public entity crime” means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services, any lease for real property, or any contract for the construction or repair of a public building or public work, involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation. See Section 287.133(1) (g), Florida Statutes.

“Convicted” means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere. See Section 287.133(1) (c), Florida Statutes.

An “affiliate” means (1) a predecessor or successor of a person convicted of a public entity crime; or (2) an entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term “affiliate” includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm’s length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding thirty six (36) months shall be considered an affiliate. See Section 287.133(1) (a), Florida Statutes.

The Respondent hereby certifies that (1) it and its affiliates have not been placed on the convicted vendor list within the past thirty six (36) months; or (2) any listing of the Respondent or any of its affiliates on the convicted vendor list has been removed pursuant to Section 287.133(3) (f), Florida Statutes. If the Applicant or an affiliate has been removed from the convicted vendor list pursuant to Section 287.133(3) (f), Florida Statutes, the name of the convicted Applicant or affiliate is as follows:

N/A

State Name of Convicted Applicant or Affiliate or N/A Here

Name of Company: BlackBeltHelp LLC

Address of Company: 936 SW 1st Ave., Suite 412, Miami, Florida - 33130

Signature for the Company: *Anthony R. Humphreys*

Title of Person Signing for the Company: President

Signature of Witness: *Harish Gambhir*

Witness' Relationship to the Company: Chief Operating Officer

NON-COLLUSION AFFIDAVIT – ATTACHMENT H

**BROWARD COLLEGE | ITN-2023-055-TP
NON-COLLUSION AFFIDAVIT | ATTACHMENT H**

State of Maryland)
County of Queen Ann's) ss.

Anthony Humphreys being first duly sworn, deposes and says that:

- (1) He/she is the Representative
(Owner, Partner, Officer, Representative or Agent)
of BlackBeltHelp LLC, the Respondent that has submitted the attached reply;
- (2) He/she is fully informed respecting the preparation and contents of the attached reply and of all pertinent circumstances respecting such Reply;
- (3) Such Reply is genuine and is not a collusive or sham Reply;
- (4) Neither the said Respondent nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other Respondent, company, or person to submit a collusive or sham Reply in connection with the Work for which the attached Reply has been submitted; or to refrain from bidding in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any Respondent, company, or person to fix the price or prices in the attached Reply or of any other Respondent, or to fix any overhead, profit, or cost elements of the Reply price or the Reply price of any other Respondent, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
- (5) The price or prices quoted in the attached Reply are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Respondent or any other of its agents, representatives, owners, employees or parties in interest, including this affiant.

(Non-Collusion Affidavit continued on next page...)

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

(... continued from previous page, Non-Collusion Affidavit)

Signed, sealed and delivered in the presence of:

_____ By: Anthony R. Humphreys
 _____ 
 (Printed Name)

 (Title) President

ACKNOWLEDGMENT

State of Florida
County of Duval

On this the 21st day of September, ~~2019~~ ²⁰²³, before me, the undersigned

Notary Public of the State of Florida, personally appeared Anthony Humphreys
Name(s) of individual(s)
and whose name(s) is/are Subscribed to the within instrument, and he/she/they acknowledge that he/she/they executed it.

WITNESS my hand
and official seal

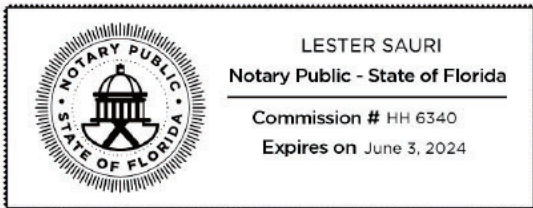


NOTARY PUBLIC, STATE OF FLORIDA

NOTARY PUBLIC
SEAL OF OFFICE:

Lester Sauri

(Name of Notary Public: Print, Stamp
or Type as Commissioned.)
 Personally known to me, or
 Produced identification:
DRIVER LICENSE



(Type of Identification Produced)
 DID take an oath, or
 DID NOT take an oath.

Notarized online using audio-video communication

OPTIONAL INFORMATION:

Type of Document: NON-COLLUSION AFFIDAVIT
Number of Pages: 2
Number of Signatures Notarized: 1

FEDERALLY FUNDED PROJECTS ADDENDUM FORM – ATTACHMENT K

**BROWARD COLLEGE
FEDERALLY FUNDED PROJECTS ADDENDUM**

All contracts or purchase orders made or entered into by Broward College, which is paid in whole or in part with funds obtained from the Federal Government or borrowed on the credit of the Federal Government pursuant to a grant, contract, loan, insurance or guarantee, or undertaken pursuant to any Federal program involving such grant, contract, loan, insurance, or guarantee, are required to contain the following terms and conditions. Accordingly, Broward College and Vendor hereby agrees to incorporate this Federally Funded Projects Addendum into the agreement between Broward College and Vendor.

ITN-2023-055-TP - CONTACT CENTER SERVICES

**REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS
APPENDIX II TO 2 CFR PART 200**

NON-CONSTRUCTION CONTRACT OR PURCHASE ORDER

- A. Contracts for more than the simplified acquisition threshold currently set at \$250,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.** Pursuant to Federal Rule (A) above, when the College expends federal funds, the College reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.
- B. Equal Employment Opportunity** – Vendor shall comply with E.O. 11246, "Equal Employment Opportunity," as amended by E.O. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and as supplemented by regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor." Vendor agrees to abide by the provisions of the following related to equal employment opportunity, to the extent applicable, which are incorporated herein by reference: 41 C.F.R. §§ 60-1.4, 60-300.5(a), 60-741.5(a), 61-300.10, Executive Orders 11246 and 13465, and Appendix A to Subpart A of Executive Order 13496. As applicable, **Vendor shall abide by the requirements of 41 CFR § 60-741.5. This regulation prohibits discrimination against qualified individuals on the basis of disability, and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified individuals with disabilities. Vendor shall abide by the requirements of 41 CFR § 60-300.5(a). This regulation prohibits discrimination against qualified protected veterans and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified protected veterans.**
- C. Rights to Inventions Made Under a Contract or Agreement** – If the purchase order includes the performance of experimental, developmental, or research work, Vendor shall provide for the rights of the Federal Government and the College in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.
- D. Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act (33 U.S.C. 1251 et seq.), as amended** – If the Purchase Order amount exceeds \$100,000, Vendor shall comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401 et seq.) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251 et seq.). Violations shall be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).
- E. Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)** – If the Purchase Order amount is for \$100,000 or more, Vendor (and, if required, any sub-contractors) shall file the certifications required by this law and related regulations, certifying that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Vendor (and, if required, any sub-contractors) shall disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award.
- F. Debarment and Suspension (E.O.s 12549 and 12689)** – Vendor represents and warrants that neither it (nor any other person or entity affiliated with Vendor and for whom the standing under these laws is imputed to Vendor) is listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Non- procurement Programs in accordance with E.O.s 12549 and 12689, "Debarment and Suspension." This list contains the names of parties debarred, suspended, or otherwise excluded by agencies, and contractors declared ineligible under statutory or regulatory authority other than E.O. 12549. If the purchase order amount exceeds the small purchase threshold (currently, \$100,000), the Vendor shall provide the College with the required certification regarding its exclusion status and that of its principal employees.
- G. Records Access** – (Contracts in excess of \$100,000). College, the Federal awarding agency, the Comptroller General of the United States, or any of their duly authorized representatives, shall have access to any books, documents, papers and records of the Vendor which are directly pertinent to a specific program for the purpose of making audits, examinations, excerpts and transcriptions.
- H. Energy Policy and Conservation** – Vendor will comply with the Energy Policy and Conservation Act (P.L. 94-163; 42 U.S.C. 6201-6422), and the provisions of the state Energy Conservation Plan adopted pursuant thereto.
- I. Procurement of Recovered Materials** – Vendor will comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, and the provisions of the state Energy Conservation Plan adopted pursuant thereto.
- J. Waste Disposal Act** – Vendor shall comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

**BROWARD COLLEGE
FEDERALLY FUNDED PROJECTS ADDENDUM**

guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired by the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

- K. Buy America Provisions** – The College has a preference for domestic end products for supplies acquired for use in the United States when spending federal funds (purchases that are made with non-federal funds or grants are excluded from the Buy America Act).
- L. Records Retention Requirements** - When federal funds are expended by the College for any contract resulting from this procurement process, Vendor certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.333. Vendor further certifies that it will retain all records as required by 2 CFR § 200.333 for a period of three years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

CONSTRUCTION AND/OR REPAIR (IF APPLICABLE):

In addition to the above provisions, the following provisions shall apply in relation to contracts or purchase orders for construction or repair:

- M. Copeland "Anti-Kickback" Act (18 U.S.C. 874 and 40 U.S.C. 276c)** – (Applies to contracts or purchase orders in excess of \$2000 for construction or repair). Vendor shall comply with the Copeland "Anti-Kickback" Act (18 U.S.C. 874), as supplemented by Department of Labor regulations (29 CFR part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that Vendor is prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he is otherwise entitled.
- N. Davis-Bacon Act, as amended (40 U.S.C. 276a to a-7) (projects in excess of \$2,000.00)** – If required by the Federal program legislation, Vendor covenants and agrees that all laborers and mechanics employed by Vendor and its subcontractors on this project will be paid in compliance with the Davis-Bacon Act (40 U.S.C. 276a to a-7) and as supplemented by Department of Labor regulations (29 CFR part 5, "Labor Standards Provisions Applicable to Contracts Governing Federally Financed and Assisted Construction"). Under this Act, Vendor is required to pay wages to laborers and mechanics at a rate not less than the minimum wages specified in a wage determination made by the Secretary of Labor. In addition, Vendor is required to pay wages not less than once a week.
- O. Contract Work Hours and Safety Standards Act (40 U.S.C. 327-333)** – (Applies to purchase orders in excess of \$2000 for construction projects and purchase orders in excess of \$2500 for other contracts that involve the employment of mechanics or laborers). Vendor shall comply with Sections 102 and 107 of the Contract Work Hours and Safety Standards Act (40 U.S.C. 327-333), as supplemented by Department of Labor regulations (29 CFR part 5). Under Section 102 of the Act, Vendor shall be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than 1 ½ times the basic rate of pay for all hours worked in excess of 40 hours in the work week. Section 107 of the Act is applicable to construction work and provides that no laborer or mechanic shall be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

IN THE EVENT OF VENDOR'S NONCOMPLIANCE WITH THE NONDISCRIMINATION CLAUSES OF THIS CONTRACT OR WITH ANY OF THE SAID RULES, REGULATIONS, OR ORDERS, THE CONTRACT/PURCHASE ORDER MAY BE CANCELED, TERMINATED, OR SUSPENDED BY BROWARD COLLEGE IN WHOLE OR IN PART.

Vendor's Name: BlackBeltHelp LLC

Address, City, State, and Zip Code: 936 SW 1st Ave., Suite 412, Miami, Florida - 33130

Phone Number: 844-255-2358

Printed Name and Title of Authorized Representative: Anthony R. Humphreys, President

Email Address: anthony_humphreys@blackbelthelp.com

Signature of Authorized Representative: *Anthony R. Humphreys*

Date: 09/01/2023

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

TAB 12

VALUE ADDED COLLEGE PARTNERSHIPS

Response: BlackBeltHelp is committed to supporting Broward College in achieving its goals and initiatives outlined in the solicitation document. We recognize the importance of promoting student, faculty, and staff engagement, creating welcoming campus experiences, addressing inequity, and helping students overcome barriers. Here's how we can contribute to these initiatives:

Marketing and Promotion: BlackBeltHelp has a dedicated in-house marketing department ready to support Broward College's goals. We can develop a range of promotional materials to increase awareness and engagement:

- **Banner Ads:** Customized banner ads that can be prominently displayed on the Broward College website to attract attention to important initiatives.
- **Social Media Posts:** Engaging social media posts across various platforms, complete with customized graphics, to promote events and initiatives. Social media is a powerful tool for reaching and engaging with the college community.
- **Customized Email Templates:** Tailored email templates that Broward College can use to effectively communicate and advertise these initiatives to their audience.
- **Press Releases:** We can craft and distribute press releases via newswire services to generate additional publicity and media coverage for Broward College's initiatives.
- **Blog Posts:** Informative and engaging blog posts focused on promoting and increasing awareness of Broward College's various initiatives. These can be published on the college's website or shared through other channels.
- **Webinars:** Collaboration with Broward College faculty to host webinars that showcase the initiatives and drive awareness across the higher education community.

Our marketing and promotional efforts aim to create a buzz around Broward College's initiatives, engage the community, and ultimately contribute to the success of these important goals. We believe that by working together, we can make a meaningful impact on student success and community enrichment.

BlackBeltHelp response to Broward College RFP# ITN-2023-055-TP

INTERVIEWS/PRESENTATIONS MEETINGS QUESTIONS

1. Regarding ADDENDUM No. 1 – R35: “All services will need to be onshore for both lines of business. Offshore will not be considered.”, even though you mentioned in your reply (Pages 7 & 59) that your India location is not applicable to Broward College, please confirm that your proposed solution is considering US based resources.

Response: Yes, we confirm that our proposed solution is exclusively U.S.-based resources and meets the onshore service requirement specified in ADDENDUM No. 1 – R35.

A photograph of a young woman with long dark hair and black-rimmed glasses, smiling warmly. She is wearing a plaid shirt. The background is a large, multi-story university building with a mix of brick and light-colored stone or concrete. The sky is clear and blue.

Higher Education's Leading Provider of CCaaS and AI-Powered CX Solutions

Empowering Colleges and Universities to Deliver Premium Support Experiences to Their Students, Faculty, and Staff.

100%
Higher-Ed Focused

200+
Clients

4 Million
Students

1.4 Million
Interactions

Company Overview

About 20 years ago, BlackBeltHelp was founded by Education for Education, developing our first contact center around the needs and desires of our development institutions, a culmination of private and public two and four-year colleges and universities. Today, BlackBeltHelp is the #1 AI-powered Contact-Center-as-a-Service provider for students, faculty, and staff in higher education. We have over 400 full-time staff, handling over 1.4 million support requests annually from approximately 4 million users distributed across our 200+ clients.

Executive Team



Anthony R. Humphreys
President



Manish Gambhir
Chief Operating Officer



Tye Reed
Vice President, Client Success



Frank Mortimer
Vice President Marketing

Over 120 Years of Executive Team Experience

100%
Higher-Ed Focused

200+
Clients

4 Million
Students

1.4 Million
Interactions

BlackBeltHelp Core Values

- **Transparency:** Openness and honesty in communication.
- **Diversity and Inclusion:** Fostering an environment that respects and celebrates diverse perspectives and backgrounds.
- **Social Integrity:** Upholding ethical standards and social responsibility.
- **Innovation:** Encouraging creativity and leveraging new ideas.
- **Customer Service:** Providing excellent service and support to our customers.

100%

Higher-Ed Focused

200+

Clients

4 Million

Students

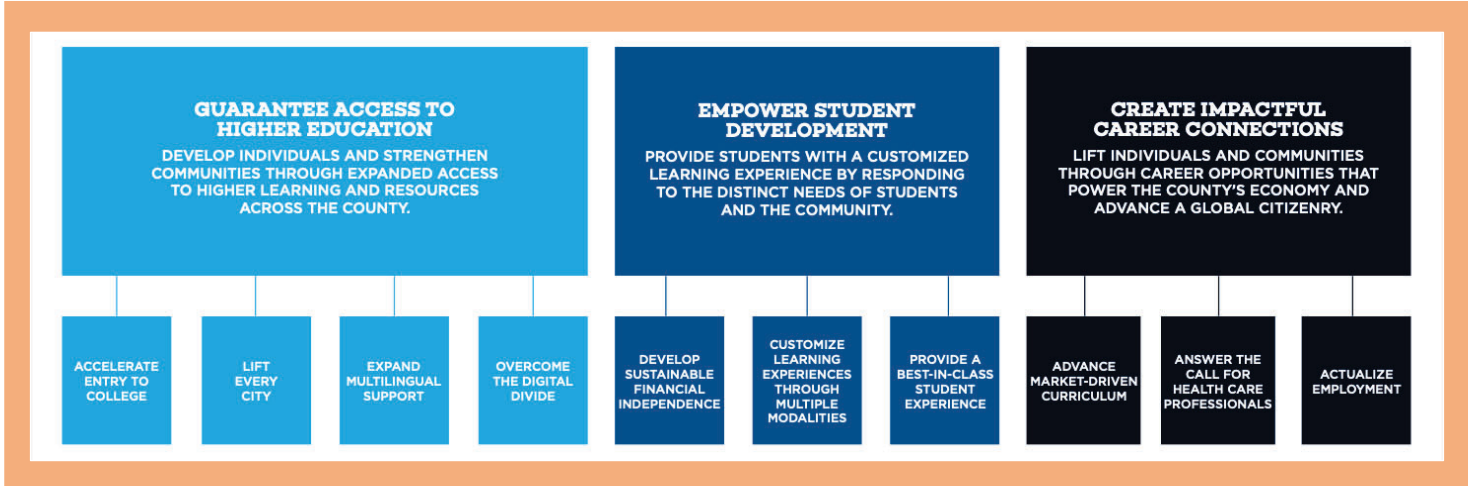
1.4 Million

Interactions

Why BlackBeltHelp

- Industry Leading SLAs
- Best in Class AI Technology
- Superior Quality & Low Cost
- Higher Education's Premiere Human Cloud Network
- High Client Retention & Satisfaction

BlackBeltHelp Alignment With Broward College



Provide a Best-in-Class Student Experience

Purpose: Examine all points in the student journey and plan for even the most aspirational enhancements to our outreach, processes, services, and programs while monitoring student sentiment and continually responding to our students' needs.

BlackBeltHelp Partner Institutions



AI-Powered Tech Enabled

BlackBeltHelp is Higher Education's leading provider of AI-powered CX Solutions.

Extend services across the institution to solve inquiries and provide wrap around services for our CX Portal

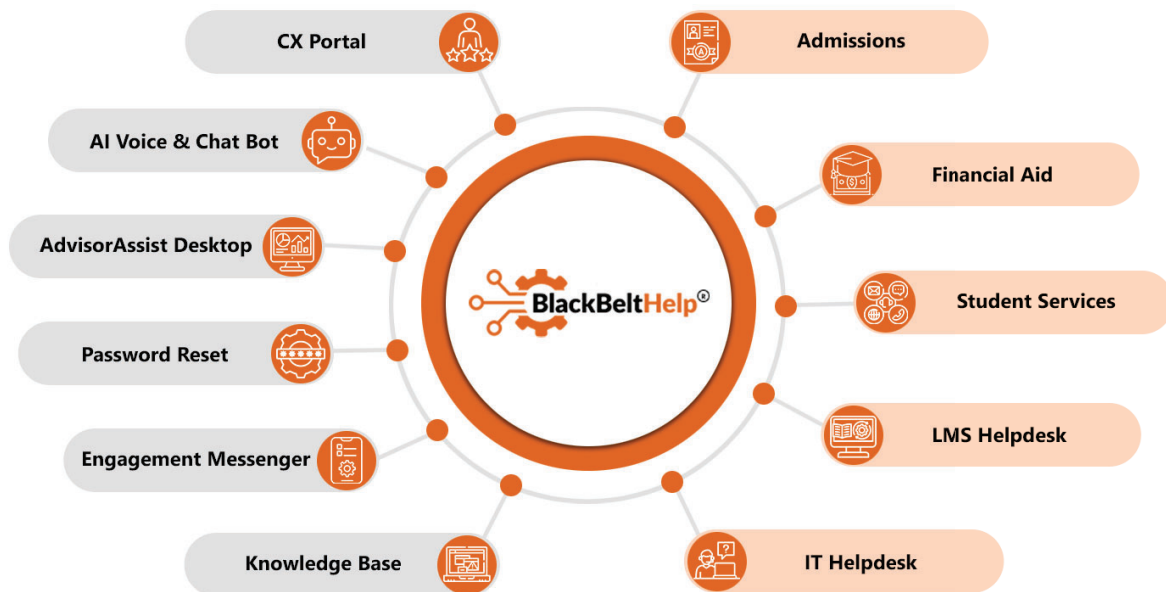
Professional services that help schools implement solutions

Human Cloud Network complimented by Customer Experience Products

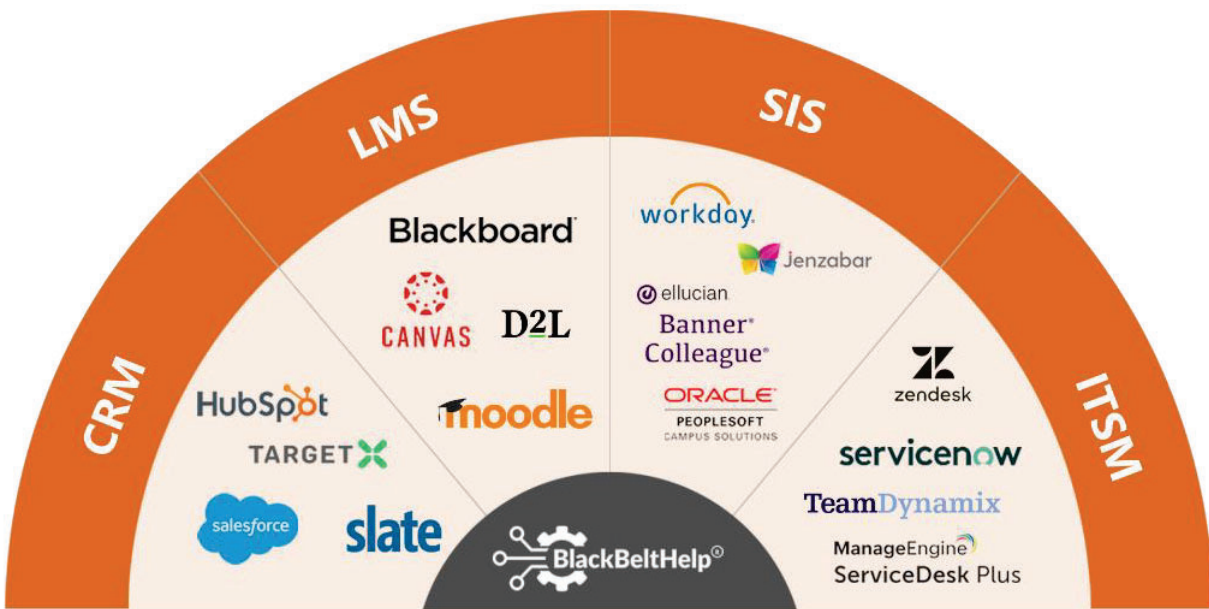
Solution Overview

Customer Experience Products

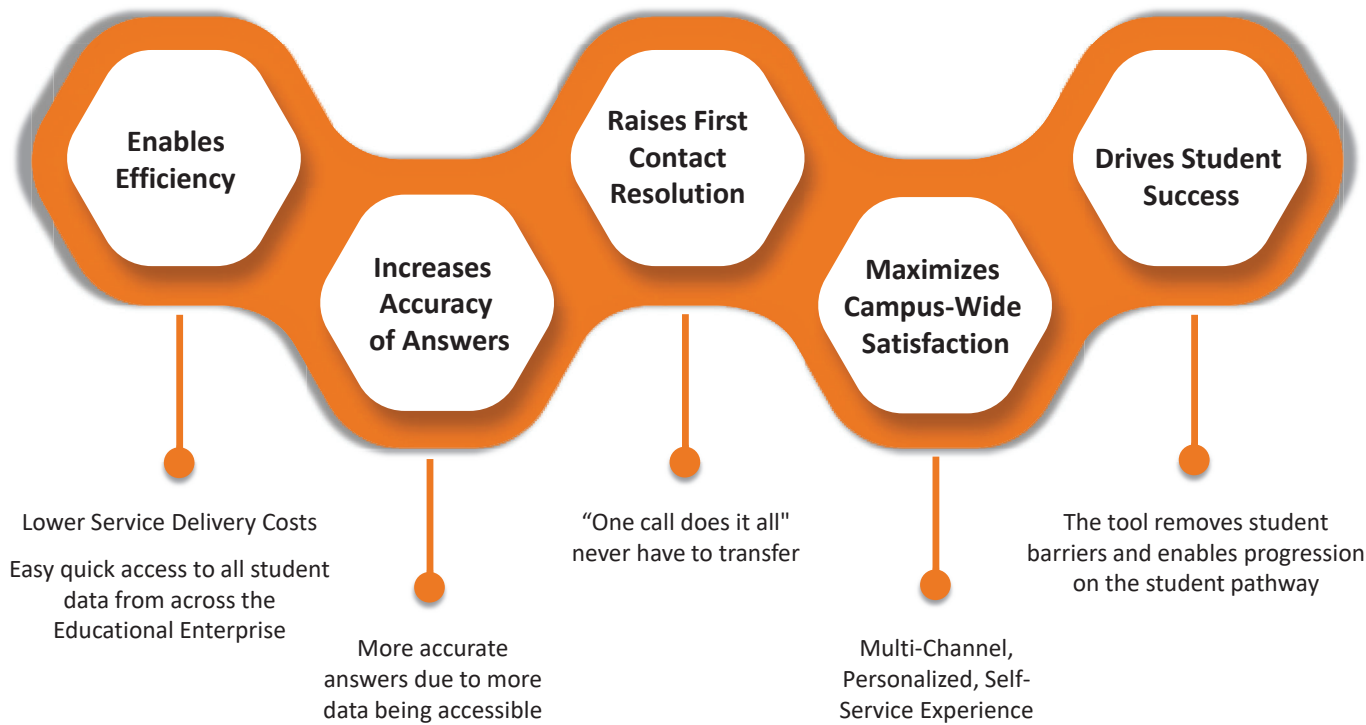
Human Cloud Network



Seamlessly Integrates Into Your Campus Ecosystem



How BlackBeltHelp Empowers Our Partners

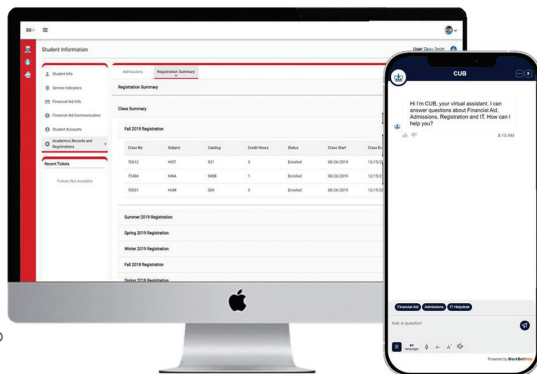


Customer Experience Solution Demo

AI Chat & Voice Bot

Key Features

- ✓ Futureproof Conversational AI Technology powered by Google
- ✓ Multi-Channel Support – Website, Messaging, Phone, and More!
- ✓ Seamlessly Integrates with Campus Applications
- ✓ Live Human Transfer
- ✓ Multi-Language Support
- ✓ Reports & Dashboards for Admins



AdvisorAssist Desktop

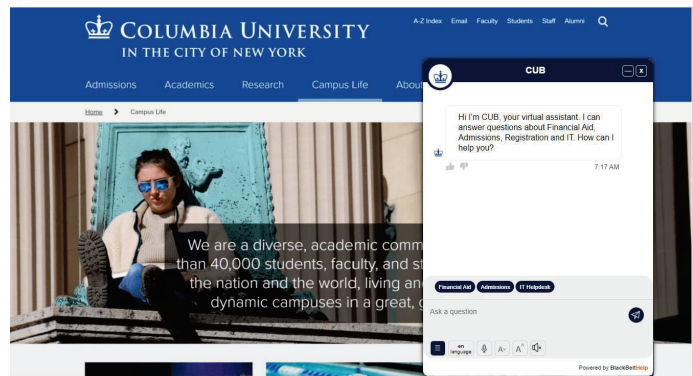
Key Features

- ✓ Seamless Integration with Campus Applications
- ✓ Single Sign-On
- ✓ User-Friendly Interface, Intuitive Dashboards, and Powerful Reporting Capabilities
- ✓ Role Based Access Control
- ✓ Create, View, & Manage Tickets within the Tool
- ✓ Secure and FERPA Compliant

Engagement Messenger

Key Features

- ✓ Broadcasts text messages to bulk users
- ✓ Integrates with SIS to fetch user details
- ✓ Messages can contain URLs
- ✓ Helps in scheduling campaigns
- ✓ Bot can be setup to respond to user FAQs regarding campaigns



Customer Experience Products Contd...

Knowledge Base

Key Features

- ✓ **Improves productivity:** Advisors can quickly and easily locate, access, and provide accurate answers to customers.
- ✓ **Help customers help themselves:** A knowledge base provides your end-users with the information they need to utilize self-help service options.
- ✓ **Streamline your knowledge management process:** Accuracy of articles, enables staff to update and maintain articles while leveraging reports for smarter decision-making.
- ✓ **Send instant alerts to your end-users:** Provides administrators with a straightforward way to communicate valuable information to users.

Password Reset

Key Features

- ✓ **Seamless Integration:** Our IVR-based password reset tool seamlessly integrates with the campus active directory or SSO provider, ensuring a hassle-free experience.
- ✓ **Multi-factor Authentication:** Enhance security with multi-factor authentication to verify user identity during password reset, reducing unauthorized access.
- ✓ **24/7 Accessibility:** Users can reset their passwords around the clock, providing flexibility and convenience for both students and staff.
- ✓ **Quick Resolution:** Significantly reduces the time to resolve password issues, getting users back to work or study faster.
- ✓ **Automated Self-Service:** Promotes self-service, reducing the need for human intervention.

CX Portal

Key Features

- ✓ Provides insights into call volumes and student behavior
- ✓ Tracks the accuracy of your AI bot and provides analytics that help with refining bot training
- ✓ Role-based access to view real-time insights
- ✓ Provides an option to download reports



Human Cloud Network

Student Services Support

OneStop – the Ultimate Solution for Comprehensive Student Support

- ✓ 24/7/365 Always On, Always Available Live Support
- ✓ Readily Available, Highly Trained Staff to Meet Institutional Needs
- ✓ Single Point of Contact for Every Student Question
- ✓ Personalized AI-powered Student Self-Service
- ✓ Integrates with Existing Campus Technologies
- ✓ Multi-channel Support – Website, Messaging, Phone, & More!
- ✓ Lower Service Delivery Costs
- ✓ Secure and FERPA Compliant

Financial Aid Support

The scope of work for Financial Aid Support

- ✓ **Grant/Scholarship options available and eligibility criteria:**
 - Federal Student Aid
 - State Government Aid
 - Aid from College
 - Aid from a Nonprofit or Private Organizations
- ✓ **Application completion assistance:**
 - FAFSA
 - Documentation
 - Common Application Errors
 - Aid Eligibility
 - The Award Process
- ✓ **Financial aid verification process**
- ✓ **Expected family contribution**

Admissions Support

Key Features

- ✓ Application processing and missing requirements
- ✓ Basic recruitment inquiries
- ✓ Routing of calls to appropriate offices
- ✓ Quick Response to email/chat inquiries
- ✓ Connecting students with advisors



Student Services Scope Of Support

Financial Aid

- Applying for Aid
- Awards
- Eligibility / Satisfactory Academic Progress
- FAFSA
- General Information
- Grants and Scholarships
- Loans
- Verification / Tax Information
- Veteran and Military Benefits

Admissions

- Admissions – Graduate
- Admissions – Undergraduate
- Application process
- Admissions status
- Requests for official transcripts
- Important dates for a semester
- Registration information
- Residency status
- Enrollment priorities
- Advisor information

Records and Registrations

- Academics
- Contact Information
- Course Information
- Degree and Graduation Questions
- Drop / Withdraw
- Enrollment / Registration
- General Information
- Grades
- Majors and Minors
- Transcripts

Student Accounts

- Appeals
- General Information
- Payments
- Refund
- Tuition and Fees

Student Services

- Academic Help
- Financial Services
- Becoming a Student
- Career Help
- Support Programs
- Transfer and Completion
- Wellness Resources

Online Learning

- About Online Programs
- Admissions for Online Students
- Advising for Online Students
- Online Student Success
- Tuition and fees for Online Students

Military and Veteran Services

- Academics
- Benefits and Services
- Financial Aid
- Tuition and Fees

Academic Advising

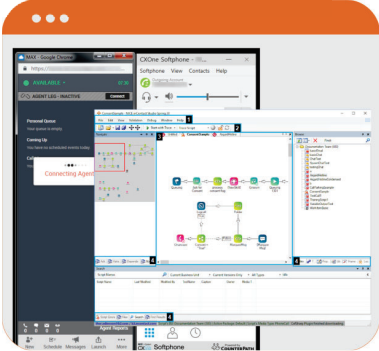
- Academics
- Honors College
- Contact Information
- Degree and Graduation Questions
- Drop / Withdraw
- Enrollment / Registration
- General Information
- Grades
- Majors and Minors
- Student Resources / Student Success

Human Cloud Network

IT Helpdesk Support

Powered by Human Cloud Network CCaaS Platform

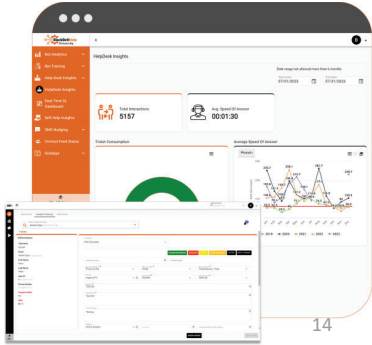
- ✔ Integrates with your Ticketing System so that all your tickets and reporting are in one place
- ✔ Integrates with your Telephone system, so your students and staff can continue to use the same telephone number
- ✔ Records All interactions for Quality Assurance
- ✔ Configurable IVR and Caller ID provide a personalized experience
- ✔ Futureproof CCaaS Technology – Powered by Salesforce & NICE InContact



LMS Helpdesk Support

Key Features

- ✔ After-Hours Support – when your offices are closed, experts are standing by
- ✔ 24/7 Always Available, Always On Support
- ✔ Domestic and/or Global Support Teams to meet your needs and budget
- ✔ Human and AI-powered Solutions working together to futureproof your helpdesk services



IT/LMS Helpdesk Scope Of Support

SIS / ERP

- Banner
- Peoplesoft
- Jenzabar
- Colleague
- Workday
- Ellucian
- Oracle

Network Connectivity

- Physical connectivity and troubleshooting
- Wireless connectivity and troubleshooting
- Mobile device connectivity and troubleshooting
- MiFi Hotspots

Productivity Applications

- Microsoft Office Suite
- OneDrive
- VDI (Microsoft Virtual Desktop)
- Slack
- Teams
- Zoom
- Stream

Learning Management System

- Blackboard
- D2L
- Canvas
- Jenzabar
- Moodle
- Schoology

Third Party Tools

- Turnitin
- Kaltura
- Respondus
- Unicheck
- CiDi Labs
- WebEx

Operating System Support

- Windows 10 and newer
- Mac OS X and newer
- IOS, Android, Windows, Mobile
- End-user (non-college owned hardware) PC support to include functionality, BHO / ActiveX, Toolbars

Email

- Microsoft Outlook
- Microsoft Entourage
- Mac Mail
- Gmail
- Microsoft Live Mail
- Client's Email System
- Office 365
- Outlook Web Access

Password Reset

- Azure Active Directory self-service password reset (via site-to-site VPN access)
- Including reset of MFA
- Portal
- SSO Login
- LMS Login
- ERP/SIE Login
- Email

Industry Leading Service Levels

Category	Performance Criteria (Monthly Average)
Average Speed to Answer (Phone)	<= 90 seconds
Average Speed to Answer (Email Submission)	<= 120 minutes
Average Speed to Answer (Web Chat)	<= 180 seconds
Customer Satisfaction	>=85%
First Contact Resolution	>=90%
Online Helpdesk Ticketing System (Salesforce)	99.99% uptime (excluding scheduled maintenance)
Contact Center Software (InContact)	99.99% uptime (excluding scheduled maintenance)

Communication With Customer



Customer Success Partnership



VP -Community Engagement

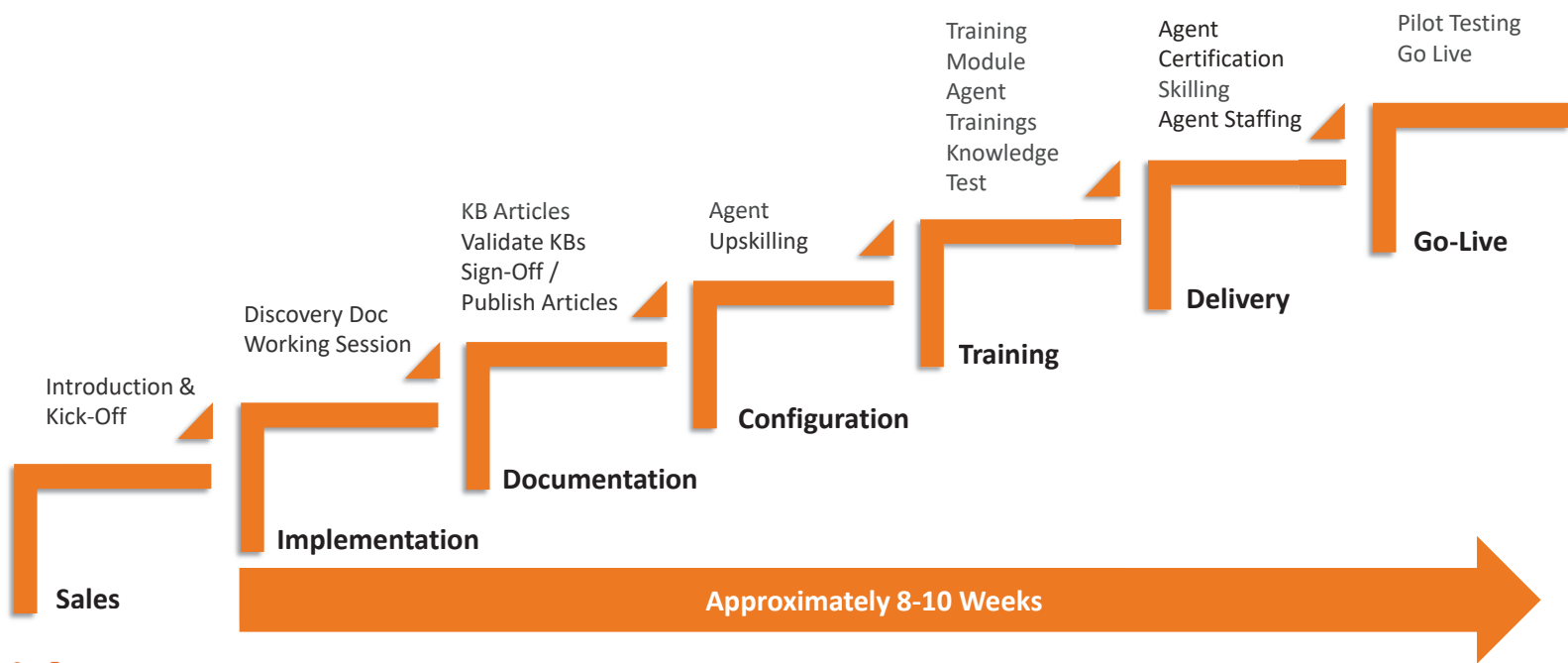
- Conducts Quarterly Executive Health Check
- Conducts periodic on-site visits to review performance, understand client challenges, requirements, and initiatives
- Share our initiatives, strategies and roadmap



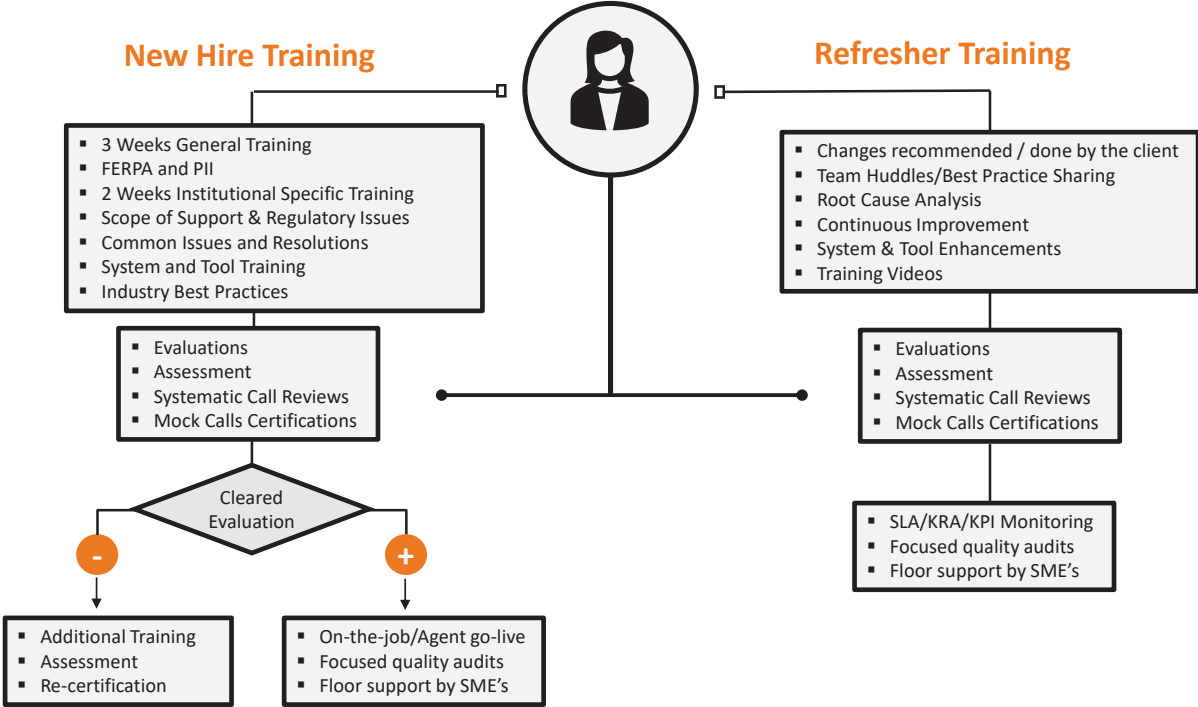
Customer Success Managers

- Support up to 10 clients
- Owns client relationship
- Weekly / Bi-weekly / Monthly Calls (virtually)
- Liaison between the University and BBH
- Coordinate with internal teams (Transition, Implementation, Operations and Quality)
- Distribute performance reports as agreed
- Focal point for escalations

Implementation Timeline – Student Services & IT Help Desk



Training



Quality Model & Standards



Proactive QA

- Call Monitoring/Recording Reviews
- Internal & external calibration
- Review survey feedback
- Standard and custom quality forms

Closing the Loop

- Customer Success Managers provide comprehensive feedback on reported quality issues

Data Security



- Student Data Never Stored
- Record Access Info only in AWS, Salesforce and/or InContact (our contact center software)
- Network vulnerability assessments and penetration testing performed by 3rd-party provider
- Comprehensive Security measures include:
 - Background checks
 - Regular security training
- ISO 27001 certified

VAPT Certified

VPAT Certified

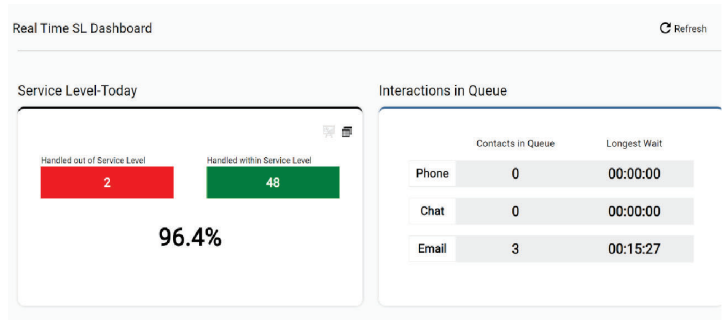
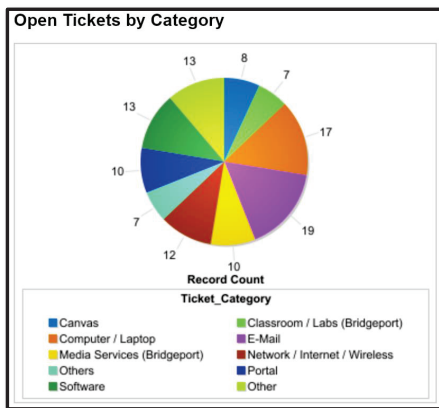


<https://compliance.salesforce.com/en>

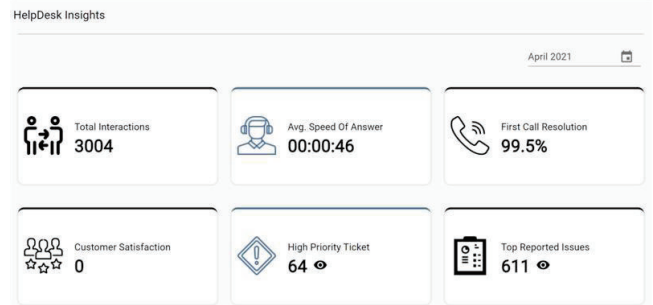
<https://www.niceincontact.com/call-center-software/open-cloud-foundation/security-and-compliance>

<https://aws.amazon.com/compliance/programs/>

Reports & Dashboards



Day	Calls Offered	Calls Answered	Phone ASA (Seconds)	Phone AHT (Minutes)	Calls Abandoned	Calls Abnd in less than SLA	Avg. Abandoned Time	Avg. Hold Time, during call (in Sec.)
01-Aug	54	50	21	14.60	4	1	103	17
02-Aug	110	102	22	12.10	8	5	169	15
03-Aug	26	25	18	14.84	1	1		31
04-Aug	14	13	19	18.83	1	1		36
05-Aug	107	99	18	13.02	8	4	76	19
06-Aug	65	63	17	12.17	2	1	88	23
07-Aug	56	54	16	11.08	2	2		5
08-Aug	66	58	41	12.79	8	5	102	6
09-Aug	53	53	15	13.41				18
10-Aug	6	5	34	10.12	1	1		
11-Aug	5	5	15	5.15				
12-Aug	91	75	24	13.45	16	10	76	24
13-Aug	71	57	41	12.75	14	11	76	24
14-Aug	89	72	64	16.09	17	11	77	35



24/7 Call Center Services And Chat/Voice Bot Customer Success Story



Solution

24/7 Virtual OneStop Student Services, Voicebot and Chatbot for IT, Admissions, Records, Registration, Financial Aid, and Accounts Receivable Services.



I would recommend BlackBeltHelp for Service Desk and Chatbot build. They built our ChatBot in 2 weeks, created a new Helpdesk website, and are helping us every day to train our Chatbot. Our students are very excited, and we have gone from 0 to over 450 Q&A's in our knowledge base in under three weeks! Thanks, BBH!

Ellen Rayz | AVP/CTO

Outcomes

Student Services

89% First Call Resolution
94% Answer Rate
63,000+ Students

Chat/Voice Bot

25% reduction of phone calls
7,910 Minutes Saved Per Month
97% Chatbot Resolution Rate
90% Satisfaction

24x7 Call Center Services And Chatbot Customer Success Story



Solution

24x7 Virtual OneStop Student Services for Admissions, Registration and Advising, Financial Aid, and Student Accounts.



BlackBeltHelp always steps-up to provide immediate support to Pasadena City College's students for the challenges that arise on Admissions, Financial Aid, and Enrollment. Having a reliable Call Center where our students can talk to a professional well-versed in our campus procedures reduces anxiety and accelerates our ability to deliver information quickly.

Candace Jones | Chief Business Officer



Outcomes



48 Secs
Avg. Speed to Answer

93% First Call Resolution

89%
Chatbot Resolution Rate

88%
Satisfaction Rate

24/7 Helpdesk Support Customer Success Story



Solution

24/7 centralized applicant Help Desk Services for 2M+ students across 116 colleges throughout California.

Scope Of Support

- Login Issues
- Portal Issues
- California College Promise Grant
- Common Assessment
- Proctor Support
- Online Course Exchange
- General Student Services Questions
- Browser Troubleshooting



“Extremely helpful and very professional. Walked me through the process and had so much patience!”

“My assigned Agent was friendly, helpful, knowledgeable and really made sure that my needs were met before hanging up the call. Exceptional service!! “

Student Feedback | California Community Colleges

Outcomes

95%
Customer
Satisfaction

89%
First-Call
Resolution

2M+
Student
Population

80K+
Interactions
Handled Annually

100%

Higher-Ed Focused

200+

Clients

4 Million

Students

1.4 Million

Interactions

Why BlackBeltHelp

- Industry Leading SLAs
- Best in Class AI Technology
- Superior Quality & Low Cost
- Higher Education's Premiere Human Cloud Network
- High Client Retention & Satisfaction

What Does This Mean?

- Increase Student Engagement
- 24/7/365 Access
- Enable Self Help
- Increase Student Satisfaction
- Drive Student Success

Questions & Answers

