Organization Name

RFI/RFP #_____

Customer Queuing System

As there is no universal way to refer to this type of solution, alternate titles may include Queue Management System, Virtual Queuing System, Visitor Management System, Queue Control Software, Wait List System, Appointment Scheduling System, Appointment Booking System, and so on.

Contact Info, Procurement Timeline, etc.

Here and throughout the document, include the standard boilerplate sections that you use for other RFIs and RFPs, such as your organization's contact info, timeline for submitting and reviewing bids, and so on.

Purpose

In light of the COVID-19 pandemic and the social distancing guidelines developed to help fight it, Organization Name can no longer accommodate the in-person customer queues that normally form inside and outside of our locations during periods of peak demand. While we have moved some of our services to an online format, there are still a significant number of transactions that require customers to visit our venues in person. Likewise, some customers simply prefer to be accommodated in-person, even when online alternatives are available. Accordingly, we are exploring the purchase of a queue management and scheduling system that will enable customers to make an advance appointment or reserve their place in a virtual line, without the need to form a physical queue in potentially crowded areas.

Scope of Deployment

We envision deploying the queuing solution to a total of _____ buildings, as detailed in the table below:

Venue or building name	Number of walk-in queues	Number of employees or departments offering appointment scheduling	Total number of monthly visitors expected

Overview of Desired Solution

We are seeking a solution that provides the following high-level capabilities:

- Prior to arriving at the venue, customers can schedule an appointment to meet with the appropriate person or department.
- For those who arrive without an appointment, they can reserve a spot in the queue using their mobile phone.
- Customers are automatically notified of the queue status (e.g. "Now Serving #21") via updates delivered to their mobile phone, as well as updates shown on digital signs at the venue.
- While in the queue, customers are free to wait anywhere nearby, rather than having to congregate in potentially crowded spaces.
- One or more employees at the venue functions as a queue attendant, advancing the queue after each customer has been served.
- Administrative and reporting tools allow the venue owner to add and remove queues, tailor the customer-facing messaging, and view stats on traffic flow and average wait times.

Functional Requirements

We are seeking a solution with the following features and attributes:

A. Customer-Facing Mobile Phone Experience

- Supports smartphones or feature phones
- No need to download or install a mobile app
- Show venue name and logo
- Join queue by taking photo of QR code
- Join queue by sending SMS message
- Join queue by entering website URL
- Show menu for selecting which queue to join at venues that have more than one queue
- Optionally show form with pre-visit survey when a visitor enqueues
- Show current status in the queue
- Show estimated wait time
- Show messages from queue attendant
- Show notification when customer is invited to enter venue or step up to counter

B. Attendant Console

- Web-based interface accessible from any modern web browser running on a tablet, laptop, or desktop PC
- View list of customers in queue
- Add new customer to queue
- View whether a customer entered the queue via QR/SMS, was added by the attendant, or made an appointment beforehand
- Advance queue
- Rewind queue
- Skip to specific customer in queue
- Remove customer from queue and indicate they were served
- Remove customer from queue and indicate they were not served
- Send message to all customers in queue
- Send message to specific customer in queue
- Switch between available queues

C. Administrative Console

- Web-based interface accessible from any modern web browser running on a tablet, laptop, or desktop PC
- Add venue
- Edit venue
- Remove venue
- Customize templates that appear on survey screens, mobile queuing screens, and attendant consoles
- Add queue (create new queue)
- Edit queue
- Remove queue
- Add system administrator
- Edit system administrator
- Remove system administrator
- Add attendant
- Edit attendant
- Remove attendant
- Add employee
- Edit employee
- Remove employee
- Add appointment calendar
- Edit appointment calendar
- Remove appointment calendar
- Specify days of week, times of day, and excluded dates for appointment calendar
- Specify pre-visit survey questions for appointment calendar
- Allow employees to add appointments to other employee calendars
- Allow employees to move existing appointments to other employee calendars
- Allow attendants to move customers to other queues
- Limit employee and attendant access to queues and calendars based on user-level permissions
- Show statistics on customer traffic by date
- Show statistics on customer traffic by day of week
- Show statistics on customer traffic by time of day
- Show statistics on percentages of customers served and not served
- View historical reports
- Download historical data
- Access historical data via API

D. Integration with Digital Signage

- Ability to show venue name and logo
- Ability to show QR code for joining queue
- Ability to show SMS number for joining queue
- Ability to show current queue status
- Ability to show estimated wait time for new queue entrants
- Ability to show messages from queue attendant
- Ability to show additional content from venue, e.g. safety messaging
- Ability to show a specific subset of queued customers listed by name, ID, etc.
- Ability to customize graphical element sizes, placement, and color
- Ability to show the above content on a fullscreen basis
- Ability to show the above content within a specific zone on the screen
- Ability to deliver the above content as a widget that can be added to any digital signage system that supports web-based content
- Ability to deliver the above as a self-contained software package to be installed on dedicated PC hardware

E. Integration with websites, email newsletters, and printed materials

- Generate widget for joining queue that can be added to website or email newsletter
- Show current queue status in widget
- Generate widget for scheduling an appointment that can be added to website or email newsletter
- Generate instructions for joining queue that can be added to printed materials
- Generate instructions for scheduling an appointment that can be added to printed materials

F. Training and Support

- Email support
- Live chat support
- Phone support
- Pre-recorded video training
- Live training webinars

G. Delivery Options

- Web-based software-as-a-service (SaaS), for use with other hardware and software that will be purchased separately
- Turnkey package including hardware and software provided by the same vendor

Pricing

Potential vendors should provide a pricing breakdown that includes the following:

- One-time software costs
- One-time hardware costs
- One-time training costs
- Other one-time costs (e.g. setup, customization, or integration)
- Recurring software costs
- Recurring training and support costs
- Other recurring costs

Where appropriate, please indicate which costs may vary based on the number of physical venues, number of queues at each venue, and number of customers served through the queuing system.

Implementation

Please describe the process and turnaround time for each of the following implementation phases:

- Creation of high-level project plan
- Identification of venues, queues, schedulable resources, administrators, attendants, and employees
- Account setup
- Setup of first venue and queue
- Administrator training
- Attendant training
- Setup of additional venues
- Setup of additional queues